FACILITY

Version 6

locus technology, inc

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Technical Support

If you need assistance or encounter any problems with the installation, please contact us via email or telephone. Service is provided 9 am to 5 pm Eastern Time, Monday through Friday on regular business days, and is included in maintenance costs. We will be more than happy to answer your questions quickly and courteously. We also provide support via our online User Forum.

Contact Information:

E-mail: info@locustechnology.com
Telephone: 410 990 9555
http://www.locustechnology.com/userforum/login.php

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Introduction

A Brief Introduction to FACILITY

FACILITY is a data-management system that provides data organization services for lab animal research. FACILITY is organized into managers with different functions, as described below. This program is intended to replace more traditional management systems such as paper ledgers or electronic spreadsheets.

The features include a powerful set of tools that will help you manage many aspects of the research facility - particularly the small species facility.

FACILITY has been continuosly developed over years of existence, and it now includes a large range of features to manage your animals, your team, your lab, and your research organization.

Navigating This Manual

Table of Contents

The Table of Contents displays the chapter titles. The chapters are organized mainly by manager, so use this to quickly find more information about the managers.

Chapter Overviews

Chapter Overviews provides a closer look at each chapter. Under each chapter heading is a list of major topics covered in that section, along with any tutorials. The Overviews offer an easy way to find more information on a specific function of Facility.

Introduction to FACILITY

This section introduces FACILITY and provides a brief overview of the contents of this manual.

Application Framework

Application Framework will supply you with a detailed run-down on how to navigate your way through FACIITY. It's a good idea to read (or at least skim through) this section before you start to use the program, and to refer back to it if you get stuck. In this chapter you'll learn about the Menu Bar, the Function Browser, the Main Workspace, and the Status Display.

Manager Descriptions

FACILITY is divided into twenty managers, or functional areas, as listed below. Each manager deals with a specific function of FACILITY, although there is some overlap among the managers.

Group Manager

This is the first manager you should explore when starting out. FACILITY is based on the concept of groups, where a group is any specified collection of animals. Group placement can be determined by a number of different criteria. A group of animals could be all those in a particular experiment, for example, or all animals received or given birth to in a certain span of days. Animals can easily be transferred between groups, and groups can be edited. Use this manager to edit individual animal information as well, such as line, strain, construct, and experiment.

Task Manager

The Task Manager lets you create and edit customizable user tasks, system tasks such as timed matings, and repetitive tasks. You can also manage technicians assigned to those tasks, and set up task charges.

Study Manager

Use the Study Manager to keep track of your various experimental studies: create the studies, assign animals to them, and attach text. You can also perform Kaplan-Meier survival analysis with log ranking on the animals in your studies.

IACUC Manager

Handle your IACUC protocol revisions, edits, modifications, and renewals. You can manage the IACUC approval process as your protocol progresses from one tab-page to the next using your institute's forms. Facility keeps track of IACUC history so you have a record of changes that have been made.

Cage Manager

All tasks associated with standard pair/trio cage mating take place here. Create mating cages, assign animals to the cages, create litters, and transfer pups to holding cages. This manager also keeps track of litter history. An easy-to-navigate ancestry tree is automatically generated when you use the Cage Manager to keep track of breeding.

Transgene Manager

The Transgene Manager provides a different mating model than the Cage Manager and Production Manager. Use this manager to take care of all your transgene mating needs.

Production Manager

The Production Manager provides a different mating model than the Cage Manager and Transgene Manager. Use this manager to take care of all your production mating needs.

Animal Assessment

Use Animal Assessment to keep track of specific phenotypic and genotypic information about your animals, as well as actions performed and assessments made.

Sample Manager

Manage animal samples, images, videos, and sample collections using the Sample Manager.

Procedure Manager

Keep track of procedures and treatments in the Procedure Manager. Procedures and treatments are group-specific, but can easily be transferred between groups. For each treatment or procedure you create, a new field is created on the Edit Procedures tab-page so you can apply the procedure to various animals in the group along with an optional technician and date.

Advisor

The Advisor shows estimates of animal yield and required breeders for a selected group, in addition to various breeding statistics. You can also view alarms for overdue events.

Internal Order Process

Another useful feature of FACILITY is the ability to assist you with logistics of running a research facility beyond animal management. The Internal Order Process manager allows you to create orders for animals within your institute.

External Order Process

The External Order Process manager works much the same as the Internal Order Process manager, but it allows you to process animal orders from outside vendors. This manager also provides space to keep track of vendor contact information.

Shipping Manager

The Shipping Manager lets you make shipments to customers specified in this manager. You can also use this manager to keep track of customer contact information.

Account Manager

Use the Account Manager to keep track of costs for your facility. The Account Manager tracks internal orders, external orders, and shipments, as well as animal care costs, procedure costs, and task costs.

Team Manager

FACILITY helps you keep track of your team as well as your animals. Use the Team Manager to manage staff, non-staff contacts, training levels and revision dates.

Location Manager

The Location Manager deals with the physical locations of your animals. Record the location of animals by campus, building, room, rack, and cage slot.

Health Manager

Use the Health Manager to keep track of animal health through health and wellness reports. You can also use this to manage animal testing.

Cryopreservation Manager

The Cryopreservation Manager takes care of your animal cryopreservation needs, such as collection, preservation, recovery, implantation, and storage of sperm and embryo.

Necropsy Manager

Use the Necropsy Manager to manage necropsy protocols and necropsy records.

Common Procedures

There are several functions which appear throughout FACILITY. These are described in more detail in Appendix B: Common Procedures., and include the following:

- Entering/Editing Information
- Saving Changes
- Key Shortcuts for Selecting Multiple Items
- Moving Between Managers
- Moving Between Tab-pages
- Filtering by Time Period
- Filter
- Sort
- Hide/UnHide (or Delete/UnDelete)
- Edit (Item)
- Edit (Items)
- Reports
- Find Animal
- Find Group
- Find Cage
- Reference Column and Displaying Overflow Information
- Print/Print Setup
- Exiting Facility

In general, procedures that appear throughout FACILITY such as Edit, Delete, or Reports are self-explanatory and are not explained unless they involve special features.

Security

FACILITY security featues protect you from inadvertantly losing important data, and can be customized so that certain users only get to use certain parts of the program.One of the advantages of FACILITY is the tight security it provides. FACILITY version 5 and up features role-based permission granting down to the button level.

List of Tutorials

The Tutorials scattered throughout this manual will help you get started using FACILITY. Tutorials provide the best way to start learning how to use FACILITY - the rest of the manual provides a more in-depth look at the specifics. They can teach you how to perform actions that are complex or spread out over several managers/tab-pages. Look for tutorials under the related manager in Chapter Overviews, or go to Appendix C: List of Tutorials to find a particular tutorial. The tutorials include suggestions for data you can enter, but if you prefer you can perform them with your own animal data.

Quick-Start Guide

The Quick-Start Guide is for those users who want to jump right into using FACILITY. It provides a list of steps that will have you entering and using your animal data as quickly as possible.

Index

If you're trying to find a particular button or tab-page, but you don't know which manager to use, this is a good place to look for it.

Tips

Often you will find several ways to perform an operation in FACILITY. Or, you might find yourself using a technique that gives you almost the results you want, but not quite. Tips are provided throughout the manual to try and provide you with the easiest and most straightforward methods.

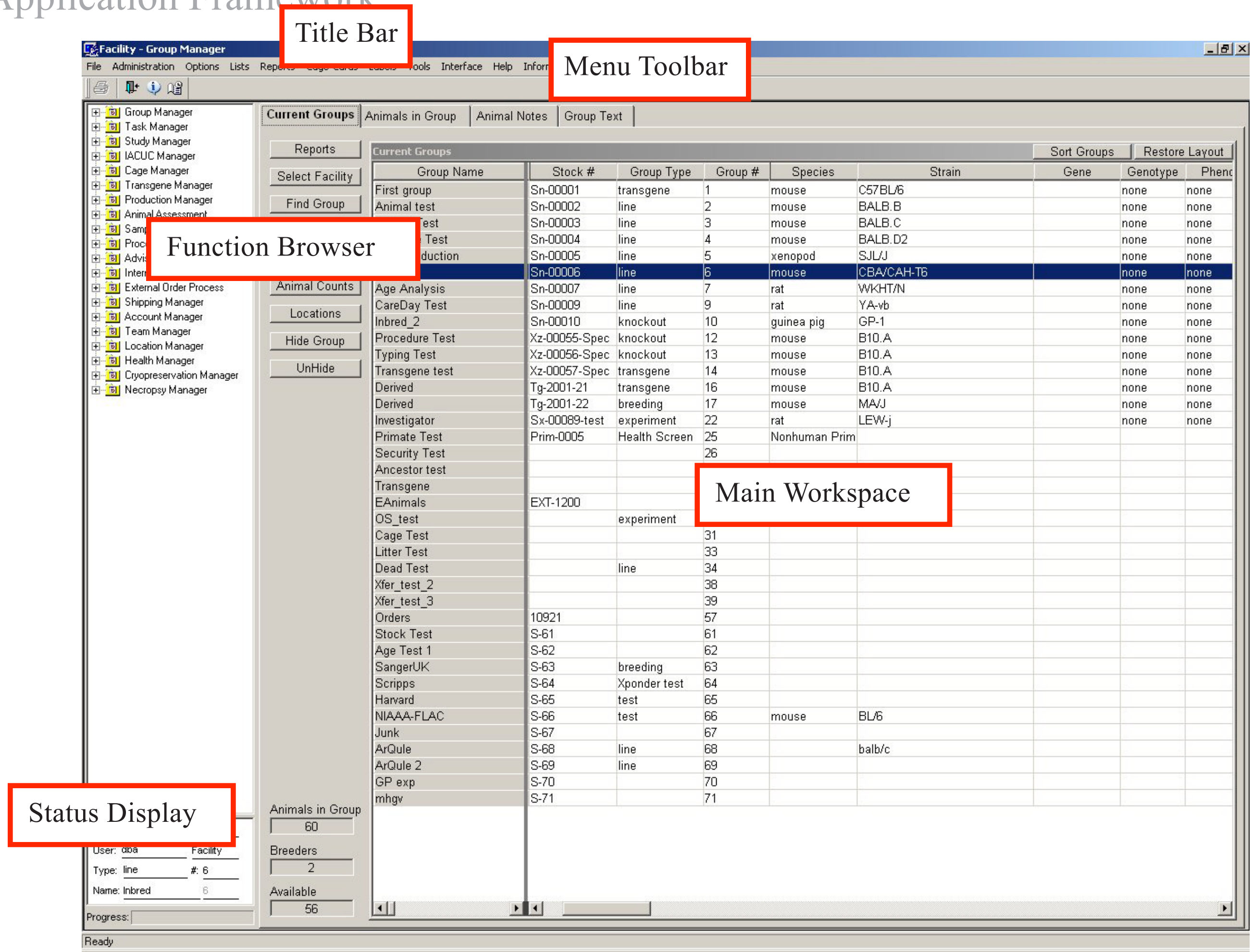
Tip: Contact information is provided on page II. You are always welcome to call or e-mail us if you have questions that are not answered in this manual!

Notes

Notes

Application
Framework

Application Framework



Menu Toolbar

The **Menu Toolbar** is located at the top of the FACILITY window. The toolbar lets you set options and preferences for all of FACILITY.

File

Print - Print out the currently displayed information. This function only works if your computer is hooked to a printer. Print on the File menu is not currently functional.

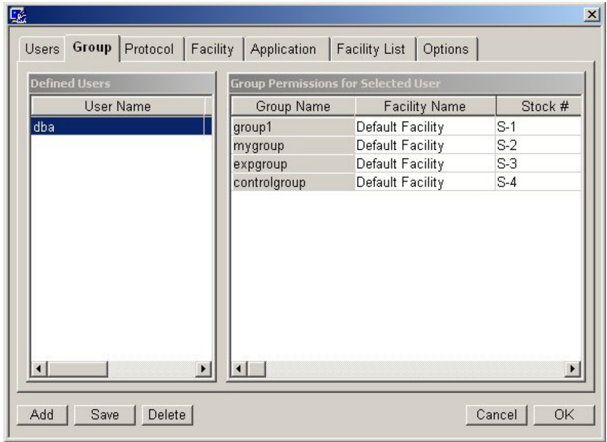
Print Setup - Set print options in order to print the desired document correctly.

Exit - Exit FACILITY. You can also do this by clicking the “X” at the upper-right hand corner of the window, or by pressing on the door icon directly underneath the toolbar.

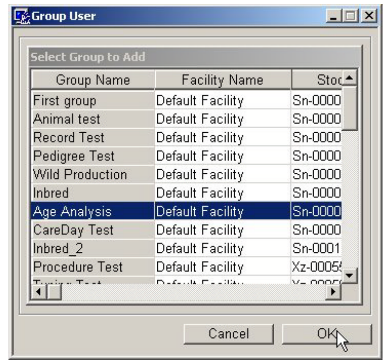
Administration

Application - Customize the permission structure of FACILITY from this drop-down list.

Users - Unless you are using a single-user license, your FACILITY adminstrator can add users on this page. Each user can be assigned different access privileges. Users in this list have permission to work with FACILITY.



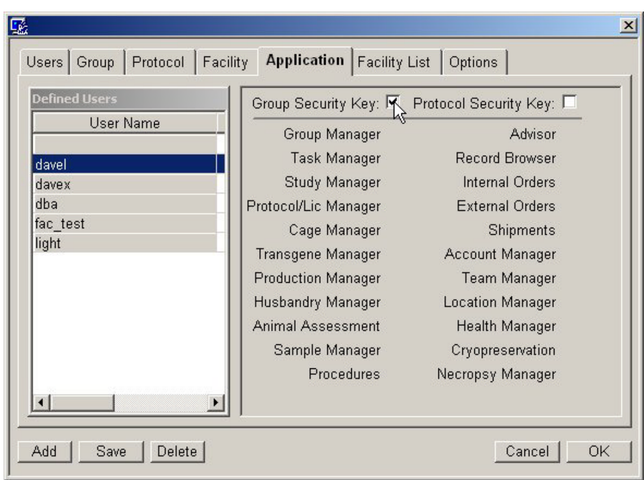
Group - The administrator can choose which groups each user can work with. For example, the user "dba" currently has access to 4 groups: group1, mygroup, expgroup, and controlgroup. This user can only work with animals in these groups. Choose a user and press Add to access a list of groups to add; added groups will appear in the "Group Permissions for Selected User" list. Select a group from this list and press Delete to remove group access privileges. You must press Save before you move on to another user or tab-page for your changes to become permanent. See "Application" below for information on turning on group permissions.



Protocol - The administrator can also choose which protocols each user can access. Choose a user and press Add to access a list of protocols to add; or, select a group and press Delete to remove protocol access privileges. See "Application" below for information on turning on protocol permissions.

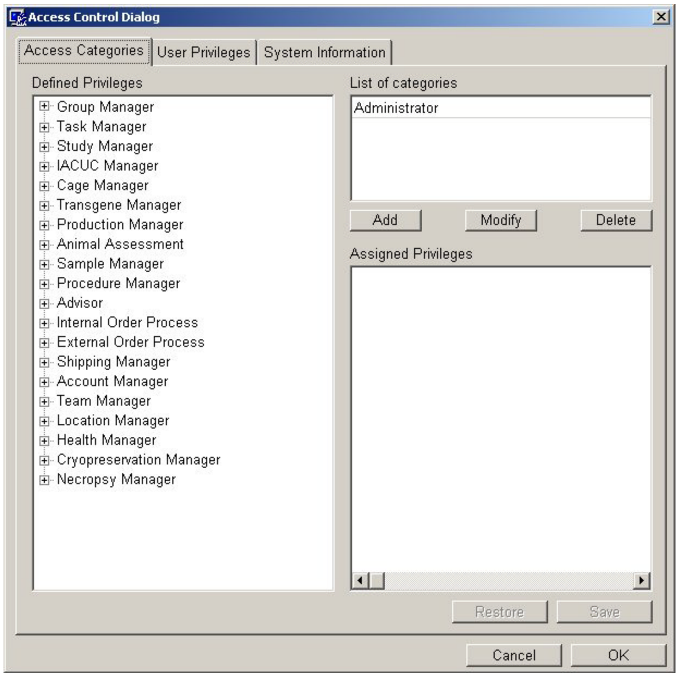
Facility - Users of FACILITY will most likely choose to organize their animals in several groups, and may choose to limit access to certain groups according to user permissions. If you are using a networked installation of FACILITY, you may choose to break down your animal organization further by assigning users and groups to certain "facilities." This allows you to split the program use among different principal investigators, to give people secure access to information pertinent to their research. Select a user and press Add to access a list of current facilities; added facilities will appear in the "Facility Permission for Selected User" list. Select a facility from this list and press Delete to remove facility permissions. You must press Save before you move on to another user or tab-page for your changes to become permanent. If no facilities are listed for the selected user, the selected user has access to all facilities.

Application - Select a defined user, then use the Group Security Key and Protocol Security key checkboxes to toggle group security and protocol security. Once securities are turned on, you can set up limited group access for a user on the Group tab-page, and limited protocol access on the Protocol tab-page. You must press Save before you move on to another user or tab-page for your changes to become permanent. The list of managers under the security keys is not currently functional.



Facility List - Press Add to create a new facility to the current list of facilities. You will be able to enter up to 3 contact names and phone numbers for each facility, and a note for each contact. To edit a current facility record, double-click on the record in the Facilities list. To remove a facility, select it in the list and press Delete. You must press Save before you move on to another facility for your changes to become permanent.

Options - Set New User and Image Storage options.



Tip: Press Save before you press OK to save changes you make on these tab-pages.

Grants - From here, the administrator can set specifc manager/tab-page access privileges for different types of users and create different user categories. Users will only be able to perform operations in areas allowed by their privileges.

Access Categories - Use this tab-page to create categories that can later be applied to specific users. To create a new category, press Add and enter the category name. To assign privileges to a category, select the category and then drag privileges from the Defined Privileges window on the left to the Assigned Privileges window in the bottom right corner, then click in the empty checkbox. To remove privileges from a category, uncheck the checkboxes. Unchecked tab-pages or manager privileges will disappear from the Assigned Privileges list; unchecked button functions will still appear with empty checkboxes. Press Save once you have fully defined the category. To restore privileges to the list, click on Restore. (This does not work once changes have been saved.)

Tip: In order to uncheck (remove) higher-level privileges (i.e., manager privileges), you must first uncheck (remove) all subcategory privileges.

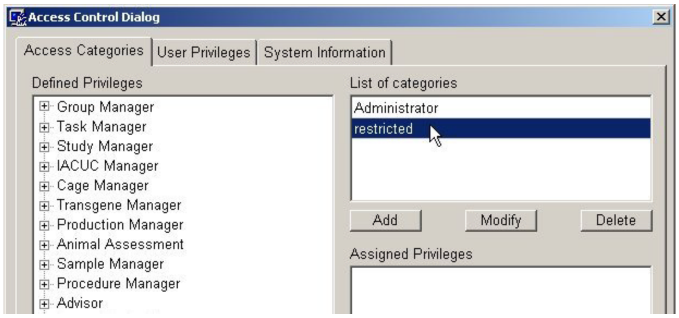
Note that when you remove Current Groups tab-page privileges, the Current Groups tab-page no longer appears for users assigned to this category. Managers similary will not appear when they are not allowed. Buttons will still appear (as non-functional) if they are not allowed.

Tip: You can only delete a protection category if it contains no Assigned Privileges.

User Privileges - Once you have created protection categories, assign users to those categories. Categories limit the areas these users can access. To assign categories to a user, select the user in the User List, then drag categories from Available Categories to Assigned Categories. To unassign categories, drag them from Assigned Categories to Available Categories. Each user can belong to several categories, and will have access to all areas covered by these categories. The Combined User Rights display will update if you select another user or navigate away from this page; use this window to ensure proper rights have been assigned. If you have a multi-user license, your administrator will be able to create new users that will appear on this page.

System Information - This tab-page displays administrative information on context, Admins location, and Users location.

Tutorial: Creating Protection Categories

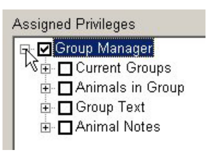


Assignment: Create a new category - restricted.

1. Select the Grants menu from Setup on the menu toolbar.
2. Choose the Access Categories tab-page from the Access Control Dialog window.
3. Click the Add button under the List of Categories.
4. Enter the title "restricted" for the new restriction category, then press OK.
5. Note that Restricted now appears as one of the categories. Select Restricted from this list.
6. The Assigned Privileges window is currently empty.
7. For this category, you only want to access parts of the Group Manager and the Location Manager. Drag "Group Manager" and "Location Manager" from the Defined Privileges display to Assigned Privileges.

Tip: If you press Save now and move to another part of the program, your changes will be lost. You must check a manager box in order to preserve it under Assigned Privileges.

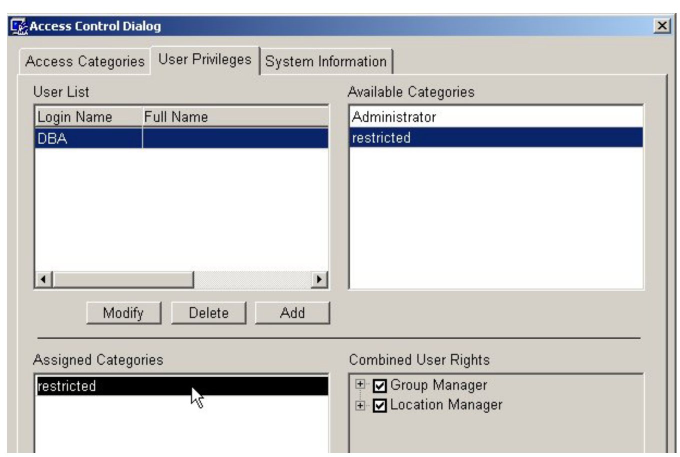
8. Click in the empty squares next to these two managers to permanently add them to Assigned Privileges.

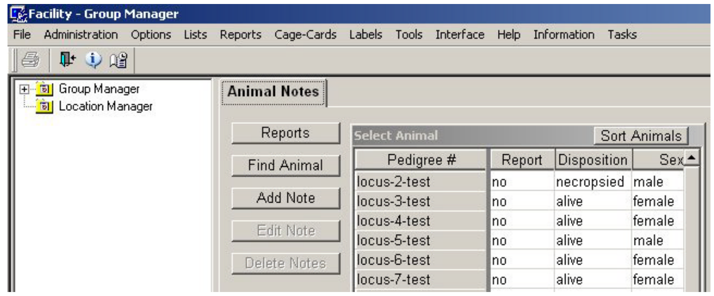


9. Currently, no tab-pages are enabled. Click on the "+" sign next to Group Manager to see a list of tab-pages.
10. For the Restricted category, you would like only the Animal Notes tab-page functional. Put a check in the empty box next to the tab-page name.

11. This allows users in the Restricted category to view this tab-page, but does not allow them to use any of the buttons. Click on the "+" sign next to Animal Notes to see a list of functions for that tab-page.
12. Enable the function "Add Note."
13. Enable any desired tab-pages and functions for the Location Manager, then press the Save button to preserve the changes you have made.

14. Go to the User Privileges tab-page and add a user name such as "John Smith". You will need adminstrator help to create a new user.
15. Select John Smith from the User List.
16. Remove any current items from Assigned Categories.
17. Drag the Restricted category from the Available Categories window in the upper right corner to Assigned Categories in the lower left corner.



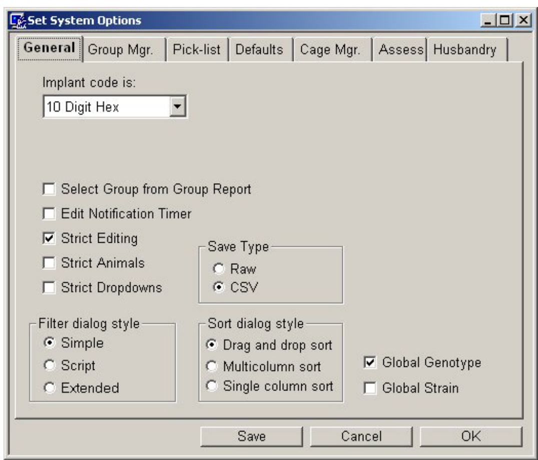


18. Note that the privileges you assigned earlier appear under Combined User Rights.
19. Now, when the selected user logs on, he will only be able to view the managers and tab-pages you have assigned to Restricted, and he will only be able to use the enabled functions.

Tip: Disallowed buttons still appear on the enabled tab-pages, but are not functional.

Allow Global Reports - Only an adminstrator can choose to allow Global Reports. A user with Global Report permissions can view global reports (reports pertaining to all animals in all facilities) under the Reports menu.

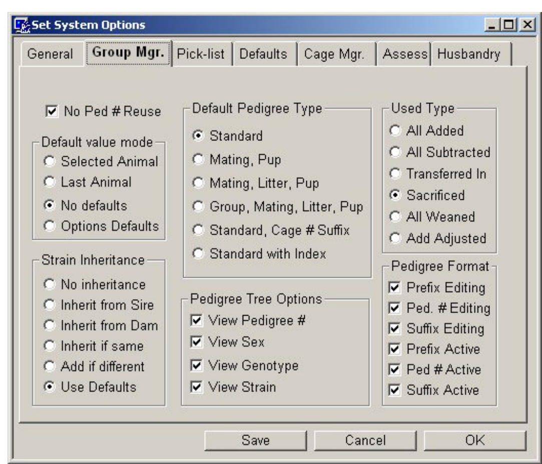
Allow Facility Reports - Only an administrator can choose to allow Facility Reports. A user with Facility Reports permissions can view facility reports (reports pertaining to all animals in all groups in the selected facility) under the Reports menu.



Options

Set Options - Set a variety of general options for FACILITY. The default settings will work for most FACILITY users. If you have further questions about customizing these options, contact a Locus Technology representative.

General - Among other things, you can set the options for Save Type (raw files are saved as they appear in FACILITY, .csv files are exportable to spreadsheet programs), Filter dialog style, and Sort dialog style. If you check the "Global Genotype" or "Global Strain" box, the drop-down lists for setting genotype and strain for individual animals will come from Global Lists (Group Specific genotype and strain lists are the default).

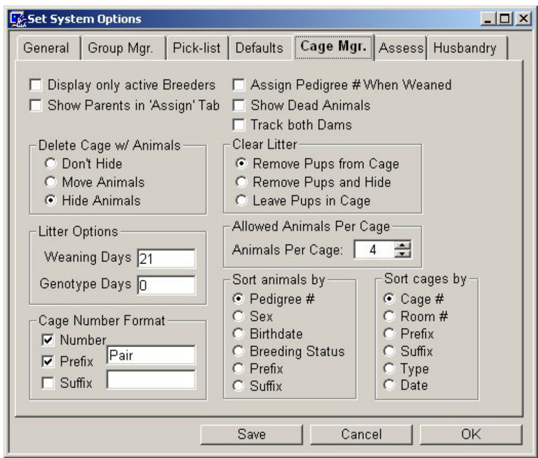


Group Mgr. - This tab-page allows you to set values for the Group Manager. Setting default value mode affects the information that appears when you add a new animal to a group on the Animals in Group tab-page of the Group Manager. "Selected Animal" sets the default Add Animals statistics to those of the currently selected animal. "Last Animal" sets the default values to those of the last animal you had selected. "No defaults" leaves all the Add Animals fields blank. "Options Defaults" sets the default values to those specifed on the Defaults tab-page (see below). You can also set default pedigree type, used type (for calculating number of animals used by a particular protocol), strain inheritance, pedigree tree options, and pedigree format. A new feature is the ability to check the "No Ped # Reuse" box. This will prevent FACILITY from reusing the pedigree numbers of hidden animals when it automatically generates pedigree numbers. It will not disallow you from manually reusing pedigree numbers.

Pick-list - The Pick-list provides a new way for you to filter reports on the Animals in Group tab-page of the Group Manager. Set your desired options on this page, then go to the Animals in Group tab-page. Select Pick List from the items in the Reports drop-down list. This will display a report specifically for animals that fit the criteria established in the Options menu. See Common Procedures for more information on filtering.

Defaults - The Defaults tab-page allows you to set default values that will appear when you Add Animals in the Group Manager for the currently selected group. In order to activate the options you have specified here, you must check the "Options Defaults" box on the Group Mgr. tab-page.

Cage Mgr. - The Cage Mgr. tab-page allows you to set a variety of options, such as how to delete a cage with animals (hide, don't hide, or move the animals), how to clear a litter (remove pups from cage, remove pups and hide, or leave pups in cage), default litter options and allowed animals per cage, cage number format, and how to sort cages and animals. These all affect the data you see when working in the Cage Manager.



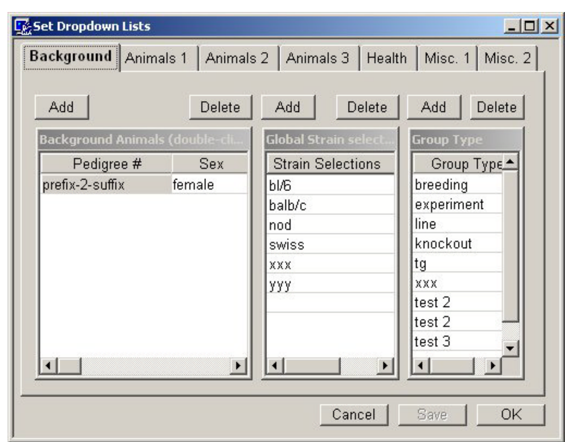
Assess - Using the Assess tab-page you can set options for Actions and Assessments in the Animal Assessment manager. Select "yes" in the Animal Assess and Animal Action fields to turn on these tab-pages. Use the Value fields to customize the entries for the Actions and Assessments tab-pages.

Husbandry - This tab-page is not currently in use.

Lists

Global Lists - Set the drop-down lists that will appear throughout all groups in all facilities. Drop-down lists enable quick, accurate data-entry, and most lists in FACILITY can be customized to fit your specific needs. Press Add to add new items to a list; select a current item to edit the text. Press Delete to remove the item currently selected in the applicable list.

Tip: Press Save before moving between tab-pages to preserve any changes.



Background - Enter background animals, global strains, and group types. Background animals can be used like regular animals in mating procedures. Use background animals to minimize the number of breeders you need to keep track of, if you only need a parent to have limited associated information. Global strains are used for setting group strain when creating a group. Group type is used to categorize groups, and might include items such as "breeding" or "experimental."

Animals 1 - These lists appear when you create or edit animals. Disposition, Coat Color, Breeding and Cause all have corresponding same-named fields in the add/edit dialog box. Cause refers to cause of animal death.

Tip: Death cause (and date) can only be set when editing current animal records, not when creating new ones.

Animals 2 - These lists also appear when you create or edit animals. The Ear Code list is for entering items in the ID Code field. Global lists 1, 2, and 3 are completely customizable. Press Add to add an item to one of these lists; this enables the list title field underneath the "Global [number]" window.

Animals 3 - Customize Global 4 the same as you would 1, 2, or 3. Global Comment provides a drop-down list that appears when you add or edit an animal.

Health - The Health tab-page allows you to customize a drop-down list used for data entry, for example, when creating or editing protocols. For every species, you can create a list of Health Types. Select a species from your lists and then add items to the Health Type List (press save before you switch species to save your changes). Likewise, for every health type you can create a list of Health Agents. Health Result is a separate drop-down list that you can customize.

Misc. 1 - Set drop-down lists for Rack Type, Room Type, and Cage cost types. Rack and Room Type are used in the Location Manager; Cage cost types are used when creating cages in the Cage, Transgene, or Production Managers. Click on the left side of a list entry to edit the Room Type or Cost Type (for cages); click on the right side to edit the associated Cage Cost.

Misc. 2 - Set the drop-down list for Wellness Issue. This field is used when creating or editing Wellness Reports in the Health Manager.

Group Specific Lists - Set the drop-down lists that will appear when you are working with the currently selected group. You can customize these drop-down lists specifically for each group in your facility. Press Add to add new items to a list; select a current item to edit the text. Press Delete to remove the item currently selected in the applicable list. Press Save before moving between tab-pages to preserve any changes.

Tip: Each group has a different set of group specific lists. If you have the wrong group selected when you open Group Specific Lists, your customizations might seem to have disappeared. Simply exit the Options menu and select the correct group in the Group Manager.

Animals - Customize lists for strain selections and genotype. These lists will appear when you are editing specific animals; use Global Lists to create drop-down lists for group creation.

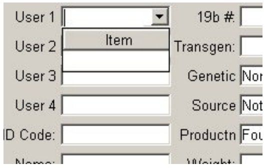
User Keys - You can customize the name of user lists as well as the items in user lists. Pressing the Add button above one of the lists allows you to enter the list title under the items in list window. These lists will appear when you add or edit an animal record.

Animal Typing - Set the drop-down list for Animal Types.

Tutorial: Configuring Drop-Down Lists

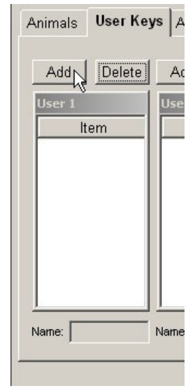
Assignment: Create a group-specific drop-down list called "Size" for a new field.

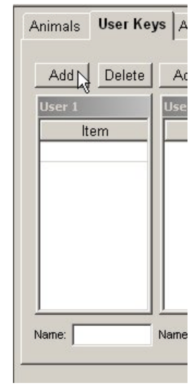
1. Go to the Current Groups tab-page of the Group Manager, and select the group "aging." (See Creating a Group, Assigning Animals to Group in Chapter 1).



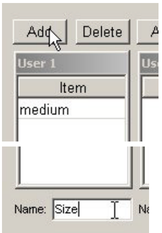
2. Go to the Animals in Group tab-page, and press Add Animals.

3. Note that there are four "User" fields in the center of this window. You will customize the name of one of these fields and create a drop-down list for it.





4. Press Cancel on the Add Animals window, and log in to Group Specific Lists in the the Lists list on the menu toolbar.



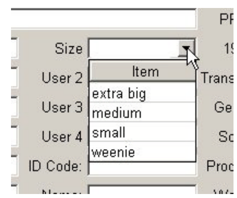
5. Go to the User Keys tab-page.

6. Press the "Add" button above the User 1 window to activate the field.

7. This will provide you with a new slot in which to enter text. Enter "medium" into this space.

8. Once the field is activated, you can provide a title along the bottom of the window. Under the User 1 field, type "animal size."

Tip: You must enter information before you can set the name of the list.



9. Enter any additional list items in the main field window, then press Save and OK to create the field.

10. Go to the Current Groups tab-page of the Group Manager and make sure "aging" is still selected.

11. Go to the Animals tab-page and press Add Animals.

12. Your new field will now be available for data entry.

Reports

These reports are different from the ones regularly available on most tab-pages. The Facility reports are described below. This drop-down list also contains a number of custom reports. See Common Procedures for more information on Reports and selecting multiple items.

Audit - This list is not currently functional, but may be implemented at a later date.

Global Reports - Global Reports provides a powerful tool to review information across the entire FACILITY database. You can choose to provide certain users with global report permissions. Note that this function will only show data in the current database instance you are working with. If you want certain users to only create reports using data in their own facilities, give them access to Facility Reports.

Tip: These reports can contain large, sometimes unwieldly amounts of data. Use the Filter and Sort functions to limit and organize your reports. Before custom sorting, Global Reports are organized alphabetically by facility, then group.

Global Animals - This report displays a comprehensive list of all the animals currently active in your database. Some examples of use for this report are finding all animals associated with a particular investigator, or finding how many active breeders total there are in your database.

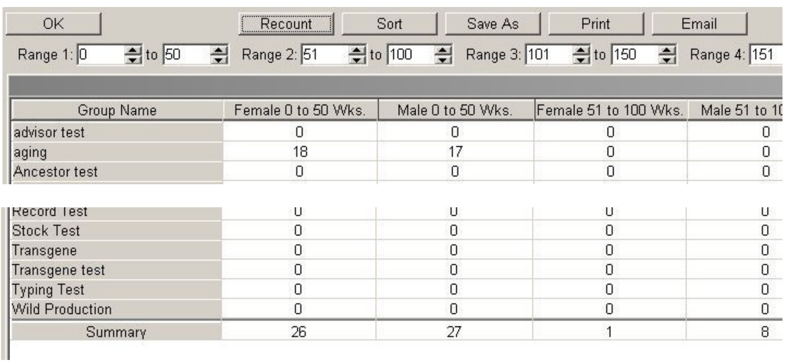
Global Animals Deleted - This report displays all animals that have been *hidden* from groups in the Animals in Group tab-page of the Group Manager. If you can't find the data you are looking for in Global Animals, and you don't know what group or facility your animal record belongs to, look here.

Global Cages - This report lists all current cages that have not been hidden. You can use this report, for example, to search your database for cages of a certain cost.

Global Weaning - This report lists all animals with a weaning date within the filter period specified at the top of the tab-page. This report is usually used to see how many animals are due to be weaned today or in the next few days. Note that you must set the viewing date at the top of the report to see animals.

Global Genotyping - This report lists all animals with a genotyping (also known as tailtipping) date within the filter period specified at the top of the tab-page. This report is usually used to see how many animals are to be genotyped today or in the next few days. Note that you must set the viewing date at the top of the report to see animals.

Global Ages - Use this report to view the ages of animals in your facilities. The animals must have valid birthdates, and they must have a status of "animal" (not "breeder" or "pup," for example.) The Range fields at the top of this window allow you to set the viewing range for each of four columns. By default, all animals fitting the above criteria are shown in one male/female split column. Setting the last range field to end at "0" will show the rest of the current animals.

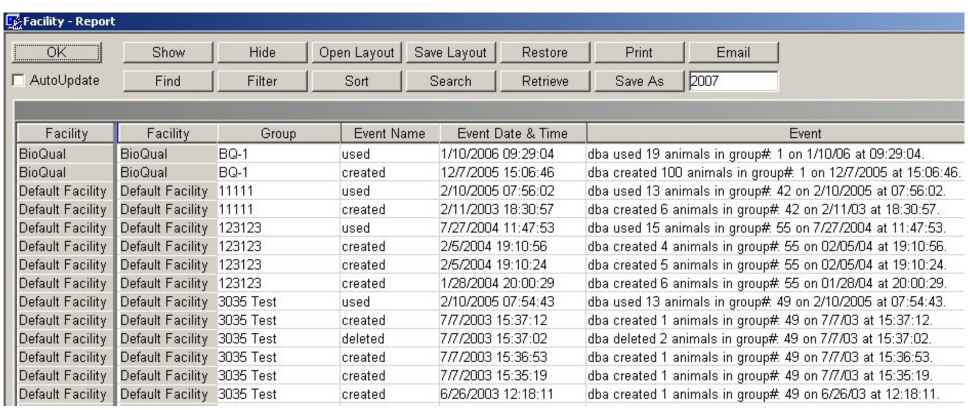


Group Name	Female 0 to 50 Wks.	Male 0 to 50 Wks.	Female 51 to 100 Wks.	Male 51 to 10
advisor test	0	0	0	0
aging	18	17	0	0
Ancestor test	0	0	0	0
Record Test	0	0	0	0
Stock Test	0	0	0	0
Transgene	0	0	0	0
Transgene test	0	0	0	0
Typing Test	0	0	0	0
Wild Production	0	0	0	0
Summary	26	27	1	8

Tip: The Range fields must be for consecutive days. If one range is from "0 to 50" weeks, the next range must start at 51 weeks, as shown in the picture.

Global Notes - This report displays all Health Notes that have been generated in the Health Manager.

Global Census - The Global Census report is a customized report for taking animal census that works with the Census tool under Tools in the menu toolbar. Its functioning is organization specific. If you would like to implement census-taking in your facility, contact Locus Technology for information.



Facility	Facility	Group	Event Name	Event Date & Time	Event
BioQual	BioQual	BQ-1	used	1/10/2006 09:29:04	dba used 19 animals in group#. 1 on 1/10/06 at 09:29:04.
BioQual	BioQual	BQ-1	created	12/7/2005 15:06:46	dba created 100 animals in group#. 1 on 12/7/2005 at 15:06:46.
Default Facility	Default Facility	11111	used	2/10/2005 07:56:02	dba used 13 animals in group#. 42 on 2/10/2005 at 07:56:02.
Default Facility	Default Facility	11111	created	2/11/2003 18:30:57	dba created 6 animals in group#. 42 on 2/11/03 at 18:30:57.
Default Facility	Default Facility	123123	used	7/27/2004 11:47:53	dba used 15 animals in group#. 55 on 7/27/2004 at 11:47:53.
Default Facility	Default Facility	123123	created	2/5/2004 19:10:56	dba created 4 animals in group#. 55 on 02/05/04 at 19:10:56.
Default Facility	Default Facility	123123	created	2/5/2004 19:10:24	dba created 5 animals in group#. 55 on 02/05/04 at 19:10:24.
Default Facility	Default Facility	123123	created	1/28/2004 20:00:29	dba created 6 animals in group#. 55 on 01/28/04 at 20:00:29.
Default Facility	Default Facility	3035 Test	used	2/10/2005 07:54:43	dba used 13 animals in group#. 49 on 2/10/2005 at 07:54:43.
Default Facility	Default Facility	3035 Test	created	7/7/2003 15:37:12	dba created 1 animals in group#. 49 on 7/7/03 at 15:37:12.
Default Facility	Default Facility	3035 Test	deleted	7/7/2003 15:37:02	dba deleted 2 animals in group#. 49 on 7/7/03 at 15:37:02.
Default Facility	Default Facility	3035 Test	created	7/7/2003 15:36:53	dba created 1 animals in group#. 49 on 7/7/03 at 15:36:53.
Default Facility	Default Facility	3035 Test	created	7/7/2003 15:35:19	dba created 1 animals in group#. 49 on 7/7/03 at 15:35:19.
Default Facility	Default Facility	3035 Test	created	6/26/2003 12:18:11	dba created 1 animals in group#. 49 on 6/26/03 at 12:18:11.

Global USDA - Use this report to keep track of how many animals have been used for each of your protocols. Select one or more protocols in the Current Protocols window to see a report form on the right along with a list of any groups with used animals (however you have defined "used"), and a count of how many animals have been used from each group. There are two types of Global USDA reports: Total and By Year. If you select the By Year report, you can enter a year in the upper left corner, and the report will show all animals used for protocols in the given year.

Global IACUC - lists all IACUC protocols and modifications. These are color-coded by expiration date: green indicates a current protocol (including duplicate and renewed protocols); light purple indicates a protocol set to expire within the month; dark purple indicates a protocol set to expire within the next three months; and red indicates an expired protocol.

Facility Reports - Facility Reports are exactly the same as Global Reports, except that they only return results for the facility currently in use, not results for the entire database. This way, you can allow certain users permission to see results for all animals in their own facilities.

History Reports - These reports list all events that have occured in Facility, in the selected group (Group Log) or facility (Facility Log), or in all facilities (Global Log). Events include most things that happen to animals, including creation, transfer, deletion, use, birth of litters, and weaning of pups. The most recent events appear at the bottom of the list. History reports aren't quite as comprehensive as audit trails, but they do provide a record of important Facility actions.

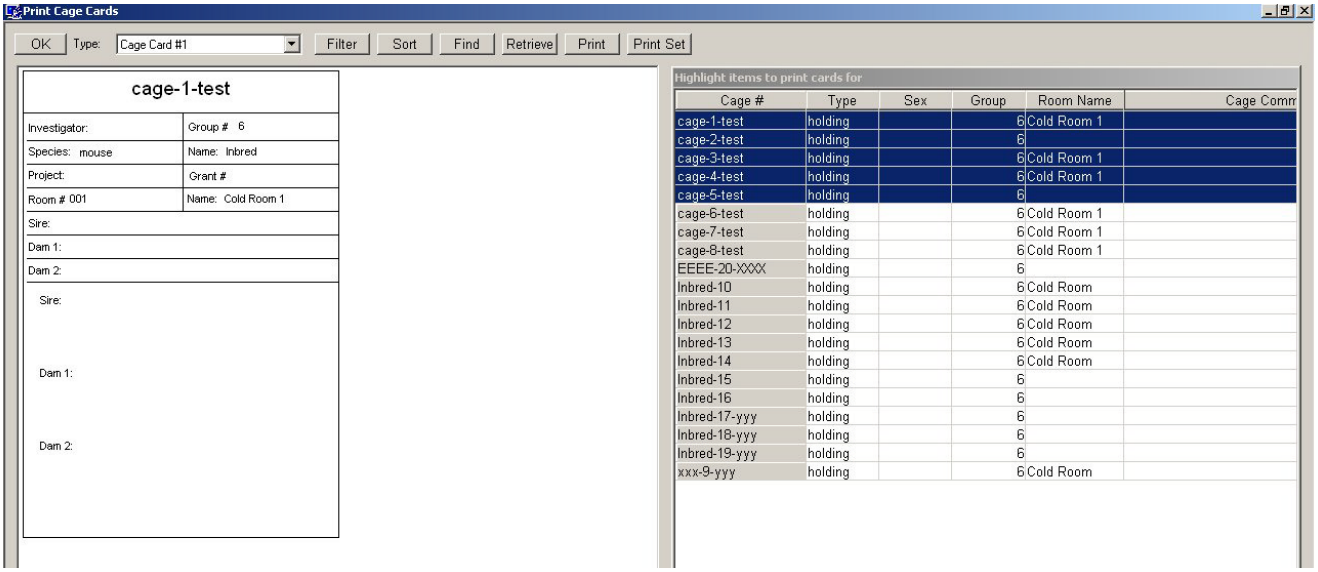
The rest of the reports are customized for specific users. They have been provided as alternates to the above forms; use them if they suit your needs. If you wish to buy your own custom report format, we suggest you choose the report format that most resembles what you want, and we can work from there.

Tip: Where applicable, see Common Procedures for more information on Reports and selecting multiple items.

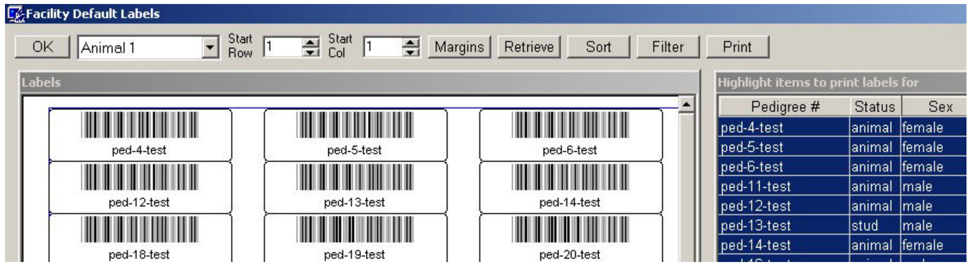
Cage Cards

FACILITY integrated cage cards provide a useful way of keeping track of animal information in the animal room. These cards can be prepared and printed directly from FACILITY, if you have the appropriate hardware set up. The list of cage cards is compiled of custom cards we have designed in the past. If you wish to buy a custom cage card format, we suggest you choose the card format that most resembles what you want, and we can work from there. Once you have chosen a format to work with, use the selector in the upper left corner to choose the cage-card format from the provided list. Select one or more items on the right side to display cage cards on the left (note that osme cage card formats don't allow multiple selection). See Common Procedures for more information.

Tip: A new feature of cage cards is the Find button. See Find Cage in Common Procedures for information on this function.



Labels



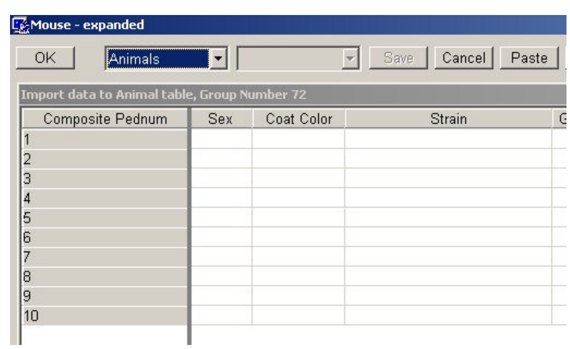
Labels allow you to keep track of information in useful places, such as on Eppendorf tubes or foil-wrapped sample packages. These labels can be prepared and printed directly from FACILITY, if you have the appropriate hardware set up. The list of labels is compiled of custom labels we have designed in the past. If you wish to buy a custom label format, we suggest you choose the label format that most resembles what you want, and we can work from there. Once you have chosen a format to work with, use the selector in the upper left corner to choose the label format. Select one or more items on the right side to show their labels on the left. Facility provides you with a default label form, plus several customized forms that might suit your needs. See Common Procedures for more information.

Barcodes - If you want to create barcodes in Facility (for cage cards, labels, etc.) you will need to set up the barcode fonts on your computer first. Click on “Start” in the lower left corner of your computer screen, and select “Control Panel” from the menu that appears. When the Control Panel window opens, double-click on the “Fonts” icon. The fonts in the Fonts folder should be organized alphabetically. Locate the font file called “3 of 9 Barcode.” (It will be a True Type font.) Double-click on the icon to open a new window that displays the typeface for 3 of 9 Barcode font. Close this window, then locate “barcod39.” Doube-click on this icon and then close the pop-up window. This should be enough to get your computer to recognize the fonts; if you cannot locate these files, or if you still can’t view barcodes after performing this procedure, send us an email or give us a call.

Tools

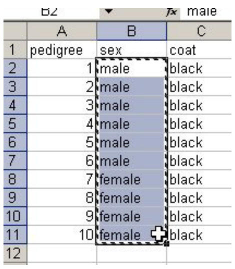
Census - The Census tool is organization specific. If you would like to implement census-taking in your facility, contact Locus Technology for information.

Sessions - Sessions is a useful tool that allows you to transmit information directly from the animal room to Facility, avoiding transcription errors. Press New Session to create a new scanning session (of type Animals or Cages), then select that session and press Run Session. As long as Run Session is pressed, you can add animals/cages to the Selected Census Session window by scanning their transponders/barcodes with a barcode reader. Once you have pressed Stop Session, you can perform several functions. You can print the session or select the groups/animals in the session in Facility (they will appear on the Current Groups tab-page or the Animals in Group tab-page. This would allow you to, for example, scan several animals to be sacrificed in a session, find those animals in their group, then mark them as “Used.” There are also places throughout Facility where you can “assign animals from session” just like you “assign animals from group.”



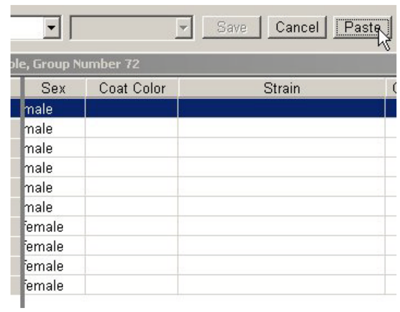
Transponders - The Transponders tool is organization specific. If you would like to integrate transponders into your facility, contact Locus Technology for information.

Import - Import allows you to import data into Facility from a spreadsheet program such as Excel. Use the drop-down list provided to select the type of data you would like to import. You can use copy-paste operations, or you can import .csv files directly.

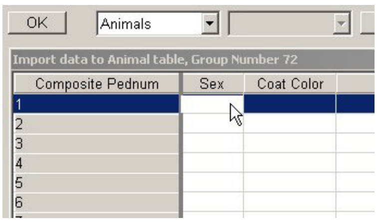


Tutorial: Importing Data into Facility

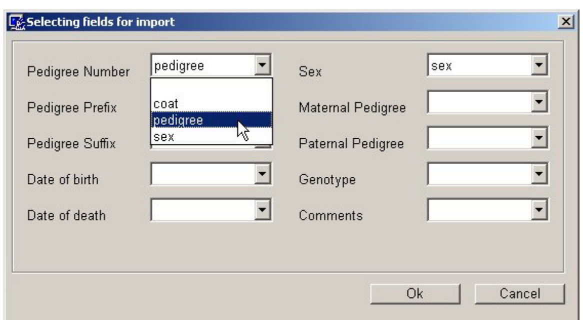
Assignment: Import animal data you have previously entered in a spreadsheet for ten animals.



1. In the Group Manager, create a new group called "Import" for your animals.



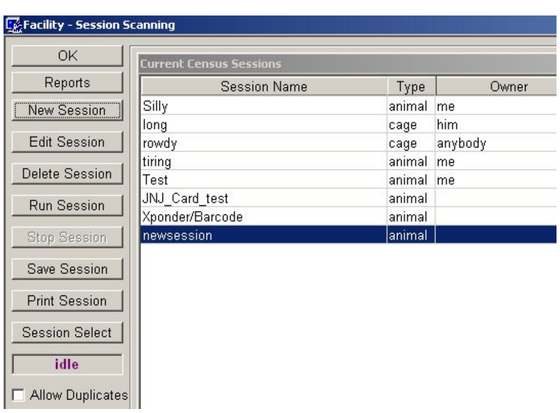
2. Go to the Animals in Group tab-page, and create ten animals. Leave animal information blank. (See Chapter 1: Group Manager for tutorials on creating animals and groups.)
3. Press Import in the Tools menu on the menu toolbar.
4. Select "Animals" as the import type. This will display the ten blank records you created.
5. Open a spreadsheet form that holds the animal information you want to import.



Copy and Paste:

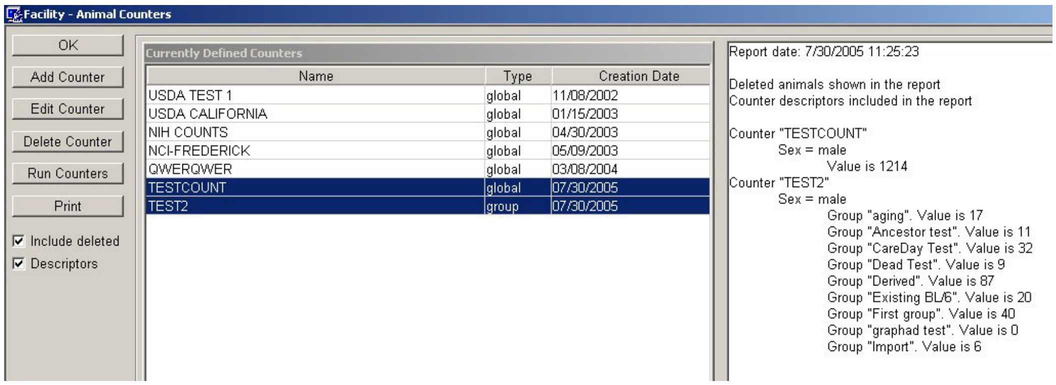
6. Select information in the column you wish to import in the spreadsheet. Do not include any column headers.
7. Press Copy or Ctrl-C to copy this information.
8. Return to Facility. Select the first field under the desired column, in this case "Sex."
9. Press Paste to paste the column of information into Import window.
10. Once you've saved and pressed OK, you can check to make sure that the data has been imported properly into your group.

File Transfer:

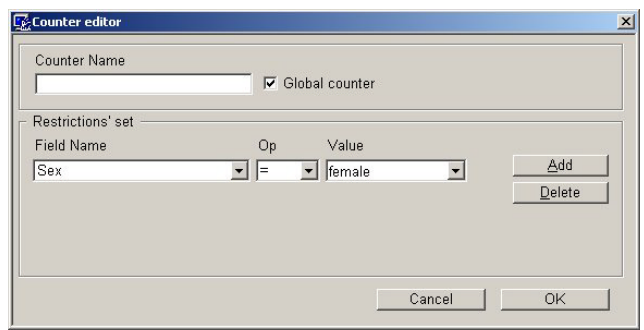


6. Save your spreadsheet file in .csv format, then close it.
7. Return to Facility. Select the first row in the list of animals to start importing in this row.
8. Press the "CSV File" button in the upper right corner.
9. Use the drop-down lists to set which spreadsheet column will go to which Facility column. The items in this list are from the headers you used in the spreadsheet.
10. Once you've pressed OK, you can check to make sure that the data has been imported properly into your group.

Tip: Not all types of information can be imported. Locus Technology provides data importation services to transfer your pre-FACILITY data into FACILITY if you have large amounts of data you do not want to import by hand.



Counter - Counter is similar to filter, but it does not return animals (only values). Use Counter to see, for example, how many animals were born on a given day, or how many brown female animals you have. Press Add Counter, and use the functions in the Restrictions' Set area to set the values you wish to create a counter for. Press OK, then run the counter to receive the desired value. If you checked the "Global Counter" box, running the counter will return the value for all of Facility; if you did not check this box, you will be able to select one or more groups the counter should look at. Values will be returned seperately for each group you selected. You can also run more than one counter at a time. All counters will return values in the window on the right.



The other tools have been custom designed for specific users. Contact us if you would like to design a tool that is not currently included.

Interface

One especially useful feature of FACILITY is the ability to interface with outside equipment. Use this menu to import data from balances, transponders, and calipers. If you would like to interface to equipment, including equipment not listed here, contact Locus Technology for specific instructions.

Balance - Import information directly from an electronic balance into FACILITY. Start and stop the record gathering from this menu, or use the balance itself.

Transponder - Record information from implantable RFID animal transponders (also known as microchips) directly into FACILITY.

Caliper - Record information from electronic calipers directly into FACILITY.

Help

Email Issue Log - Click on Email Issue Log to quickly e-mail any problems to technical support.

About - About provides information on copyright and build number.

User Forum - Log onto our secure User Forum for more help information.

Information

This item will appear if animals are in need of weaning. Click on it to see how many animals need to be weaned.

Tasks

This item will appear if your system contains overdue tasks. Press it to see how many tasks are overdue.

Toolbar shortcuts - Exit, Information, and Tasks

Below the main toolbar there will appear one to three shortcut buttons.

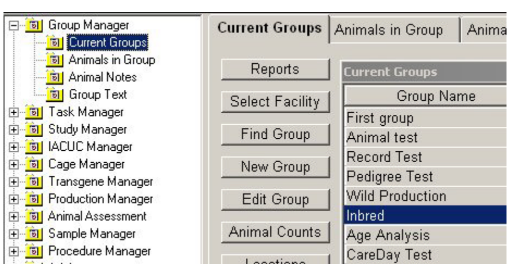
Click on the door image to exit FACILITY.

Click on the i-bubble to access weaning information. (See Information above.)

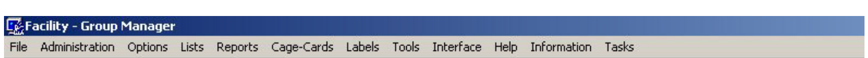
Click on the task sheet to access overduc task information. (See Tasks above.)

Function Browser and Title Bar

The **Function Browser** is the area to the left of the **Main Workspace** (see below) and above the **Status Display**. The function browser allows you to select the manager you wish to work with. Only one manager can be viewed at a time. If you run the mouse over the manager titles, you will see that they become underlined and turn blue. Press on the desired manager at this point to open the manager in the main workspace. If you would like to see a list of all the tab-pages belonging to a specific manager in the function browser, click on the “+” sign to the left of that manager. You can select a particular tab-page from this drop-down list or from the tabs along the top of the manager display in the main workspace.



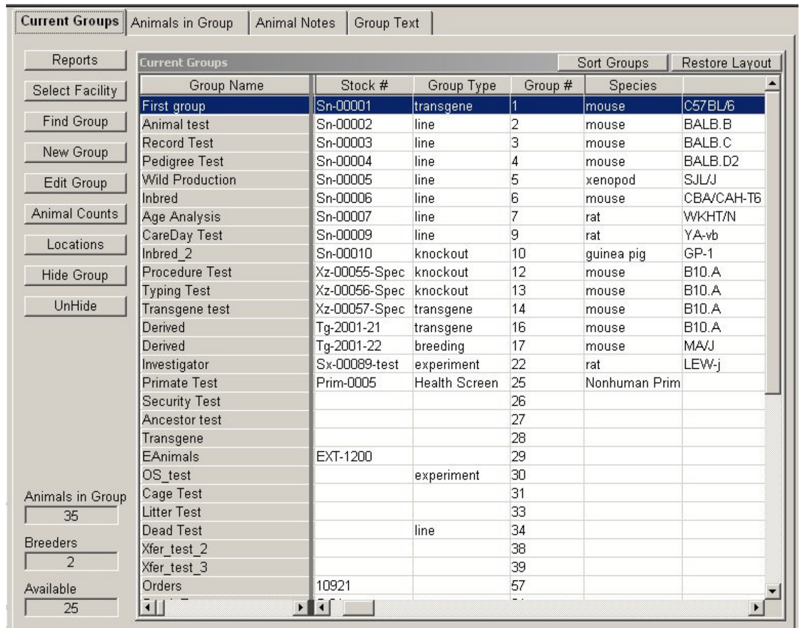
The Title Bar appears at the very top of the FACILITY window. It displays the manager currently selected in the Function Browser.



Main Workspace

The **Main Workspace** displays the current manager. It is displayed to the right of the **Function Browser** and takes up most of the screen. Select a manager in the function browser to display that manager in the main workspace.The left-most tab-page will appear by default (unless another tab-page was specifically selected).

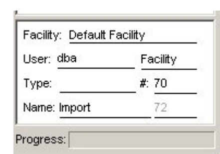
Navigate through the current manager by using the tab-pages at the top of the main workspace or the drop-down menus in the function browser. The currently selected tab-page is always the one displayed in the main workspace; the name of the tab-page will appear in bold at the top of the displayed page. There are usually several buttons on the left side of the main workspace which are used to manipulate the displayed data. Data is displayed in windows on the right side of the main workspace. Occasionaly the main workspace displays information in the lower left-hand corner.



Tip: Many tab-pages bring up editing windows when you double-click in the main data display.

Status Display

The **Status Display** is located in the lower left-hand corner of the Facility window, underneath the **Function Browser**. The status display lists the current facility, user, database, type, name, and the # and name of the group you are working with. The Progress bar will show you how much time is left in the current task. (Some tasks, such as creating a large number of animals, can take a couple of minutes.)



Notes

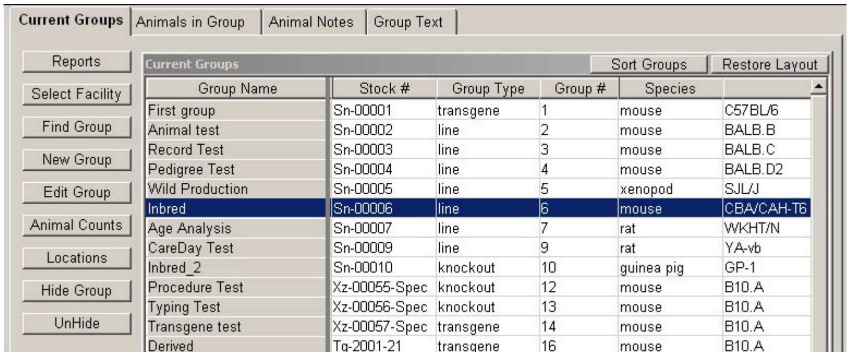
Notes

1. Group Manager

1. Group Manager

1.1 Current Groups

The first step towards organizing your animals in Facility is to create groups on the Current Groups tab-page. Once you have formed groups, you can create animals, put animals in cages, and manage all your animal data.



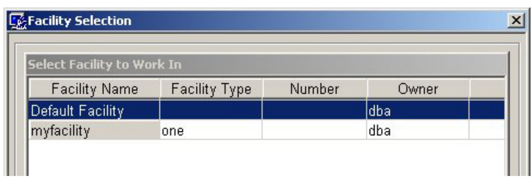
Tip: Animals can belong to only one group at a time.

Reports, Find Group, Edit Group, Hide Group, UnHide

See Common Procedures.

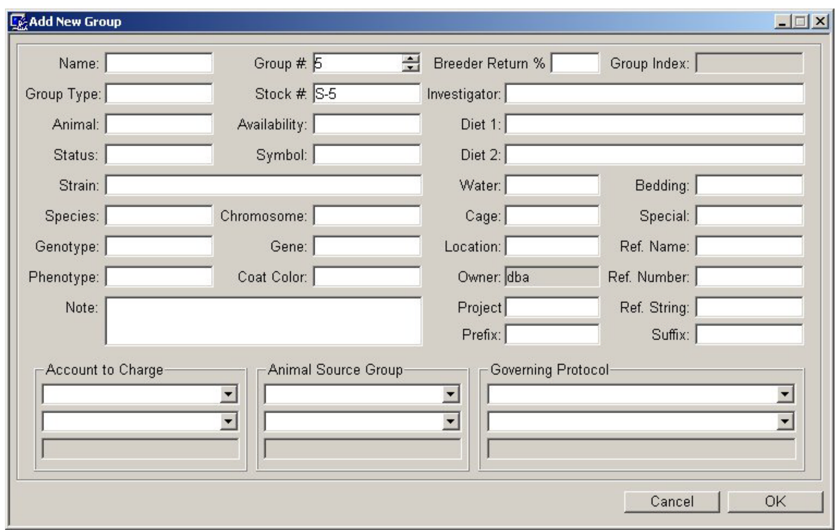
Select Facility

Click on this button to select the facility in which you would like to create the new groups. This is an important decision, as groups created in one facility cannot be accessed in another (althought animals can be transferred between facilities). Also, all information in Facility is dependent on groups; you can't access any of the functionality unless you are working in the right facility.



Tip: Be sure that when you create rooms, they belong to the same facility as your groups, so that you can put your animal cages into those rooms.

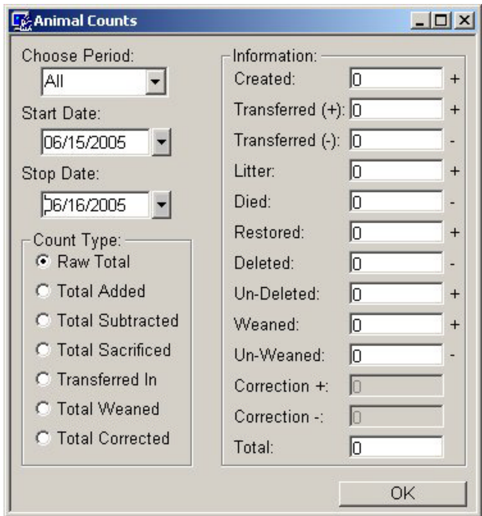
New Group



Press New Group to open the Add New Group window. This is the first step to using the Group Manager, and the rest of Facility. Enter information into the provided fields. Press OK to save the new group, or Cancel to close the window without saving. Once created, the new group will appear in the Current Groups window. The group starts out without any animals or cages attached to it.

Some fields, such as "prefix" and "suffix", are transmitted to all animals created within that group. If you want all animals in the group to have the same prefix and/or suffix, enter text here. Otherwise, leave these fields blank. (You can also enter prefix and suffix manually for each animal created.)

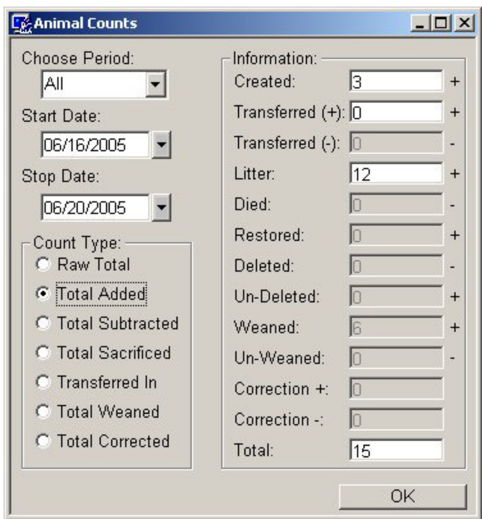
There are three fields at the bottom of this window that link this group to outside functions: Account to Charge, Animal Source Group, and Governing Protocol. Create an account in the Account Manager, then assign it to one or more groups to have charges for those groups recorded in that account. Generate an IACUC protocol with the IACUC Manager, then assign it to one or more groups to record animals used to that protocol. The Animal Source Group field helps you keep track of where animals originated; use this field, for example, when you transfer animals to a new group using Internal Orders.



Tip: Notice that some fields, such as Genotype and Strain, appear when you create a group as well as when you create an animal. In these cases, you can enter both group-specific and animal-specific genotypes and strains.

Animal Counts

Animal Counts allows you to see at a glance the animal statistics for a selected group for a given period of time. Choose a group in the Current Groups window, and then click Animal Counts to bring up a new window. Set the desired time period with the drop-down calendars, and the animal numbers in each category will automatically update. Customize your Animal Counts view by using the bubbles in the Count Type section.



Locations

Locations is a report that gives you a quick view of rack, room, building, and campus information for the animal records in the currently selected group.

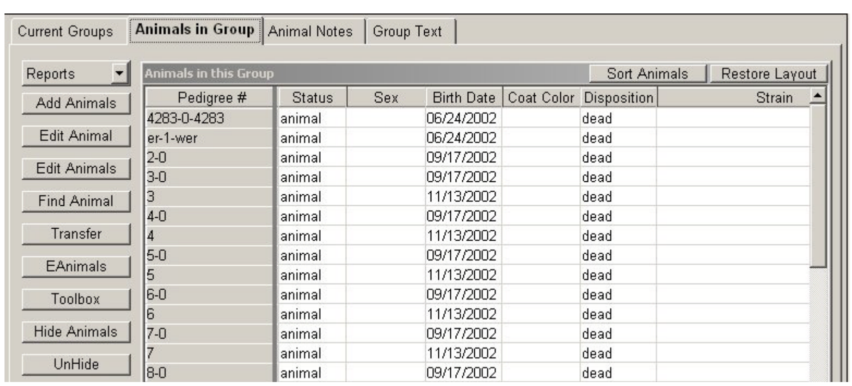
Sort Groups and Restore Layout

Sort Groups and Restore Layout appear in the upper-left corner of the main workspace. See Common Procedures for more information on sorting.

Animals in Group, Breeders, and Available

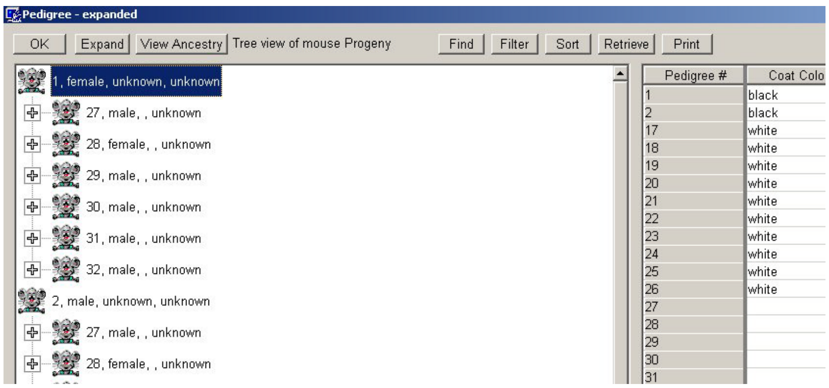
These data fields appear in the lower-left corner of the main workspace. Animals in Group displays the number of current, live animals in the selected group. Breeders displays the number of animals, both male and female, currently involved in regular or production mating. ungendered. Available shows how many animals in the group have a status of "animal;" that is, animals that are not pups or breeders. This display is not applicable for groups involved in transgene mating.

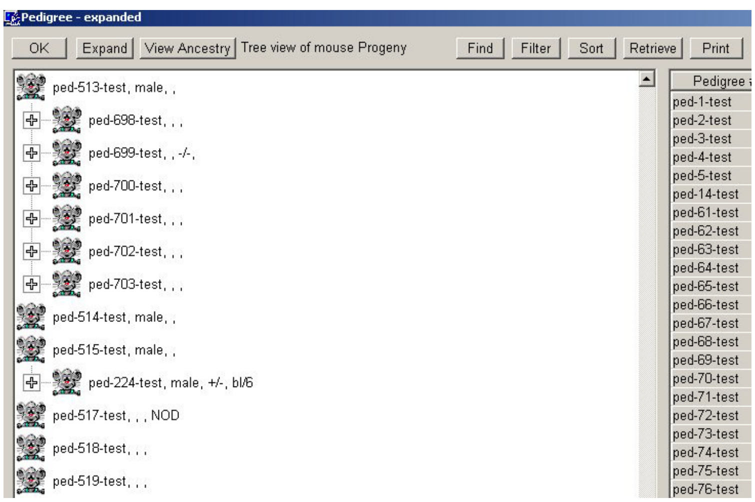
1.2 Animals in Group



The Animals in Group tab-page shows all animals belonging to the group selected on the Current Groups tab-page. On this tab-page, you can create and edit animal records. You can also transfer animal records from one group to another, or from one facility to another. Note that this is not the area in which you record the births of new animals - that function is reserved for the Cage Manager, the Production Manager, or the Transgene Manager. Primarily, this tab-page is used to enter animal records already present in your pre-FACILITY (unless you have a large number of records and wish to use our data importation services), to add animal records you obtain through methods other than breeding (unless you use Internal/External Ordering), and to edit current animal records (for purposes such as updating weaned animal data and marking animals as sacrificed, censored, or used to calculate kaplan-meier curves and protocol totals).

Tip: Unless you specifcy "No Ped # Reuse" on the Group Mgr. tab-page of the Options menu, the system will not stop you from reusing pedigree numbers. Note that reuse of pedigree numbers makes it difficult to use Find Animal.





Reports

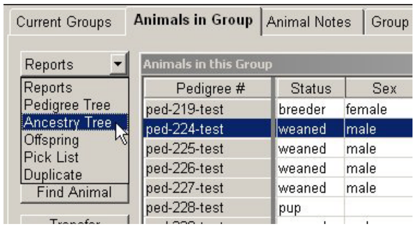
Reports - See Common Procedures.

Pedigree Tree - Click on Pedigree Tree to view the ancestry and progeny pedigree trees for all animals in the currently selected group. You can quickly move to view the tree for a particular animal by selecting that animal in the window on the right; use Find, Filter, or Sort to find the desired animal record. Toggle between progeny and ancestry views with the View Progeny/Ancestry button in the top left corner. Double-click on one of the mice in the tree view window to see progeny/ancestry information for that animal, or press the Expand button in the top left corner to view the trees for all animals in the selected group (this could take a while). In the Progeny view, note that if the selected animal does not have offspring, nothing will happen when you double-click. In the Ancestry view, if the selected animal does not have recorded ancestors, double-clicking will reveal ghost animals with no associated information. This is because all animals have parents, but not all animals have offspring.

Tip: If you have a very large number of animal records, pedigree trees can take a few minutes to generate.

Ancestry Tree - The Ancestry Tree has been significantly modified since the last release of FACILITY. Select an animal on the Animals in Group tab-page, then select the Ancestry Tree report to access this function. The animal you selected will appear as the base of the ancestry tree; the branches are made up of that animal's ancestors. If there is no record stored for an ancestor in the FACILITY database, that animal will appear as a "ghost" in the tree. The window in the upper right lists any offspring belonging to the currently selected base animal, and the window in the lower right lists its siblings. This new ancestry tree is fully navigable to allow you to walk through the animal's entire history. Select an animal within the ancestry tree (one that doesn't appear as a ghost) to make that animal the base of the tree, and the entire tree view will shift. You can also select one of the offspring or siblings from the windows on the right to become the base animal of the tree (click on the base animal in the tree view to refresh the offspring and sibling lists). At any time you can choose to print either the left page (Ancestry Tree) or the right page (offspring and sibling information).

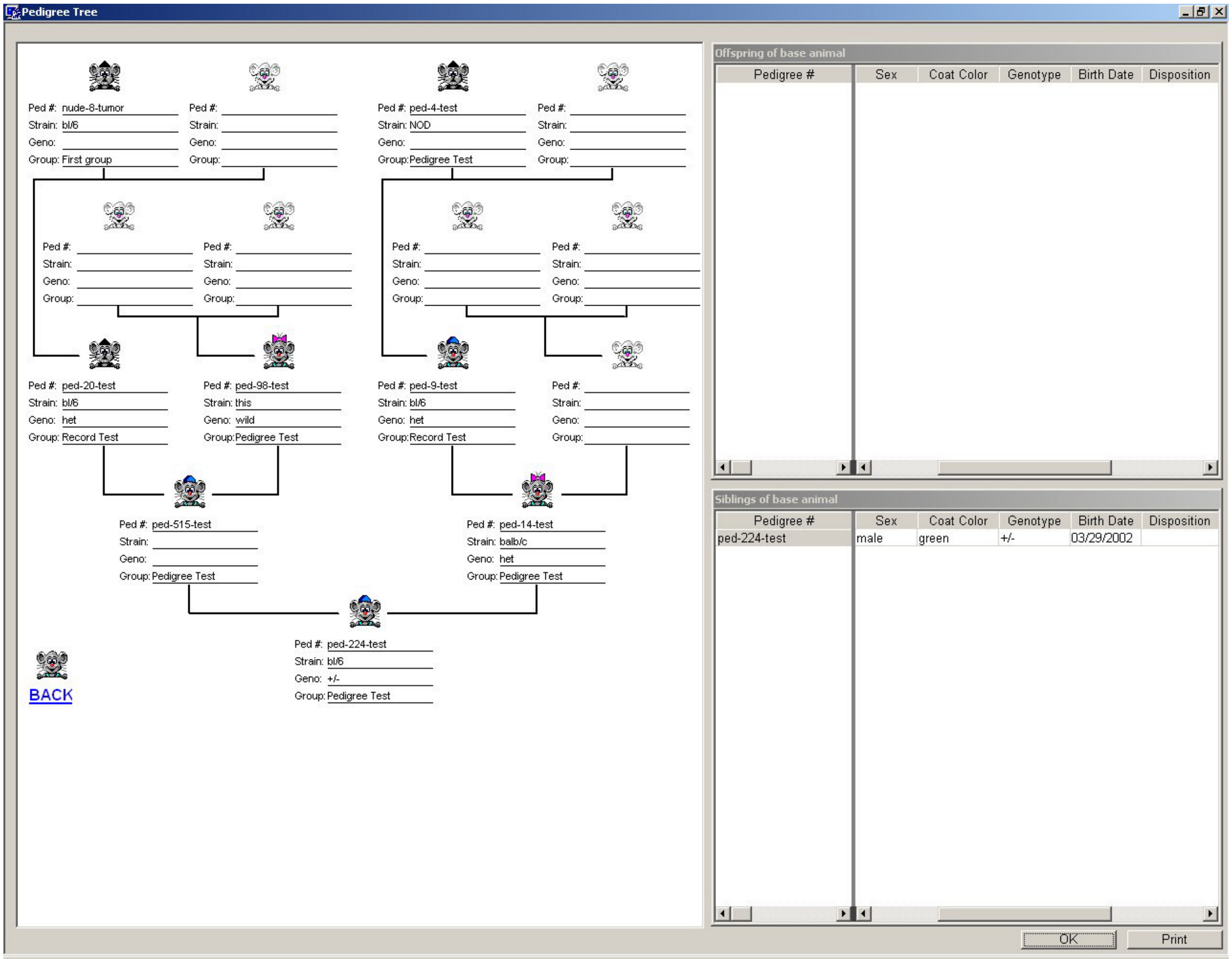
Tip: Pedigree and Ancestry Trees are compiled from data collected when you create mating records in FACILITY. These trees are not limited to a particular group, and cannot be disrupted if an animal is hidden or moved to another group.



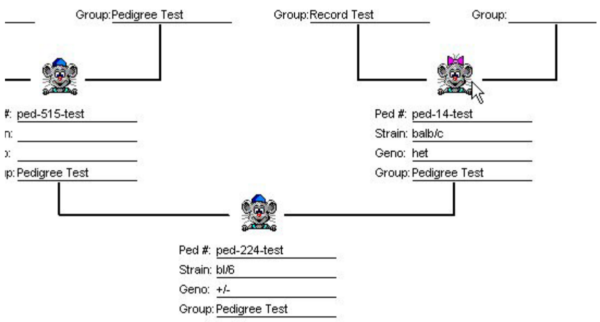
Tutorial: Navigating the Ancestry Tree

Assignment: You want to review the ancestry information for animals in one of your groups.

1. In the Group Manager, select the Current Groups tab-page.
2. Choose a group that contains a good amount of litter history (See the Cage, Transgene or Production Manager chapters for information on breeding. Breeding animals automatically creates the litter history used to build trees.)
3. Go to the Animals in Group tab-page and select an animal.
4. Press the Reports button on the left, and select Ancestry Tree from the list of reports.



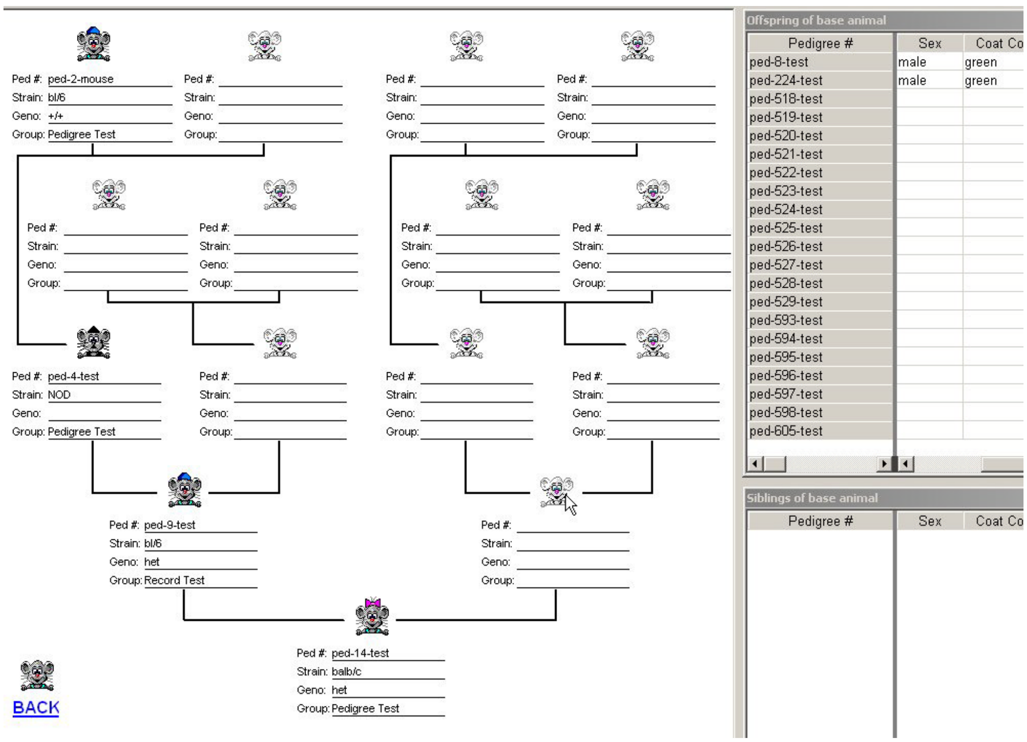
5. A new window will open with a view of the ancestry tree, and any siblings and offspring for the selected animal (Note that the current base animal, ped-224-test, does not have any siblings or offspring.)



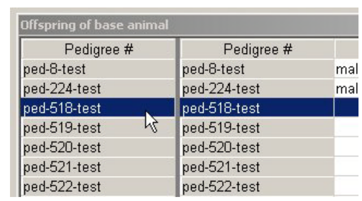
6. Click on one of the parents of the base animal to shift the tree view.

7. The base animal for the tree is now ped-14-test. This animal does not have any siblings, but it has a whole list of offspring. Ped-224-test no longer appears in the ancestry tree, but you can see that it is present in the list of offspring for ped-14-test. Note that all ancestry information has been shifted down by one generation.

8. You can click on any non-ghost animal in the tree to set that animal as the base animal; you can also use the Back button located to the left of the tree to move back one step.

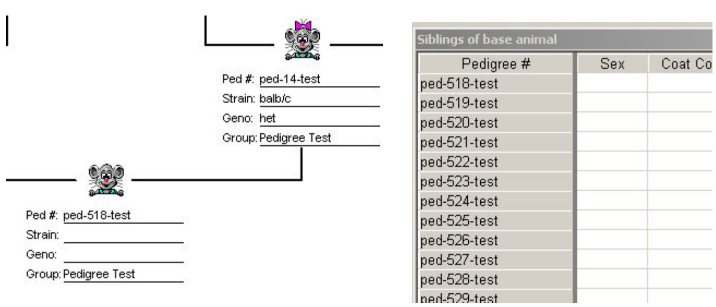


9. Select a new animal from the list of offspring belonging to ped-14-test.



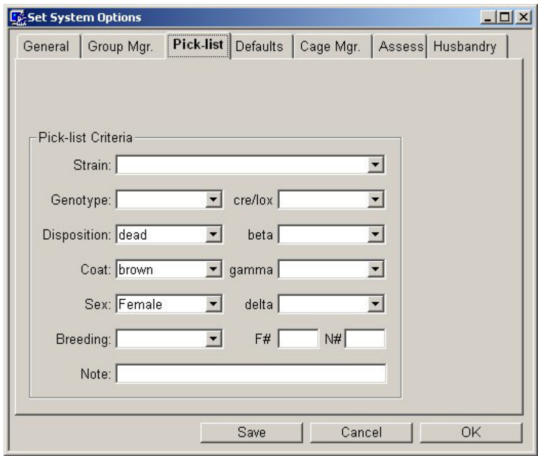
This will become the new base animal.

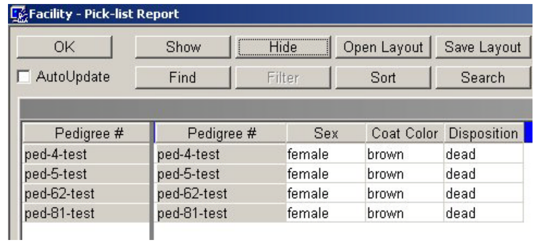
10. Click on this animal to refresh the lists of offspring and siblings. Note that ped-518-test does not have any offspring, but it does have several siblings. You can click on one of the siblings in this list to set that animal as the base of the tree.



Tip: The animal records in this tree represent the entire breeding history that has been recorded in FACILITY. Animals in this tree can belong to any group that is linked by litter history.

Offspring - Offspring shows you a report containing a list of animals in the currently selected group on the left. On the right is a short description of the currently selected animal in the list, and a list of the selected animal's offspring.





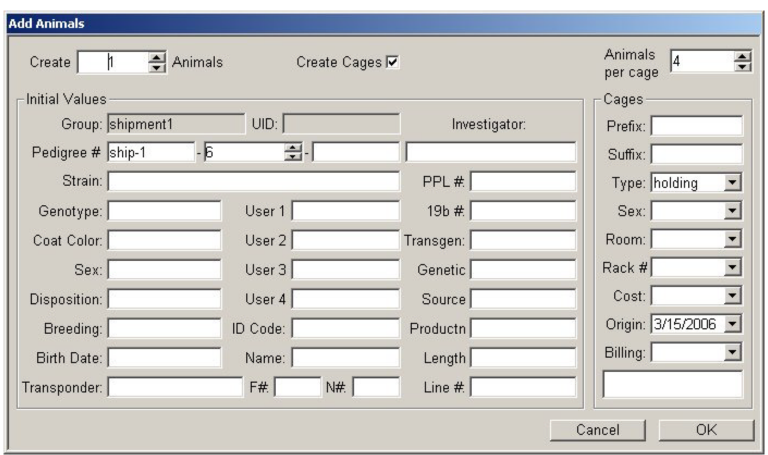
Pick List - Click on Set Options in the Options list on the menu toolbar, and go to the Pick List tab-page. This will allow you to set several criteria for picking a list of animals out of a group. Once you have set the criteria, saved, and returned to the Animals in Group tab-page, you can choose to view the Pick List report. Use this option if you frequently want to filter for one specific set of criteria.

Tip: Multiple columns have been hidden on the above report. See Common Procedures for more information on Reports.

Duplicate - During the process of creating, editing, and transferring animal records, some animals might end up with the same pedigree number. This report tells you if there are any animals in the selected group with duplicate pedigree numbers.

Add Animals

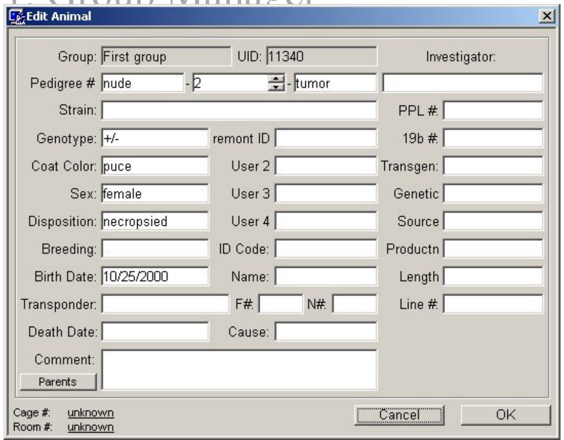
Using this function, you can add animals one at a time or in batches. If you have several animals to add that share characteristics (they are all female, for example, or all have the same coat color) or if you do not wish to enter any animal information at this point, you can increase the number of animals in the upper left hand corner. There is no required information necessary to create a new animal. When you create new animals, check the Create Cages button to automatically assign them to holding cages that will appear in the Cage Manager. You can edit cage information on the right side of the window. If you do not wish to view this information, check the Create Cages box in the upper-middle part of the Add Animals window. Note there is no "Comment" field in version 6; this function has been replaced by Animal Notes.



Tip: FACILITY will automatically assign pedigree numbers to new animals. Pedigree numbers allow you to personalize your animal categorization and identification in FACILITY. You can edit the auto-generated number here, as well as the prefix and suffix for further customization. You can also use the Toolbox to renumber multiple animals.

Edit Animal

The Edit Animal window is slightly different than the Add Animals window. To open this window, select



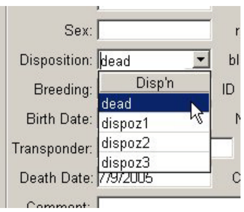
an animal and press Edit Animal, or double-click on the animal. Note that you cannot edit cage information from this window, as you can from the Add Animals window. Also, the Cage # and Room # for the selected animal are displayed in the lower-left corner. Opening the Edit Animal window also enables the Death Date and Cause fields.

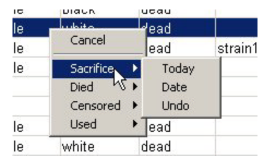
Edit Animals, Find Animal, Hide Animal, UnHide

See Common Procedures.

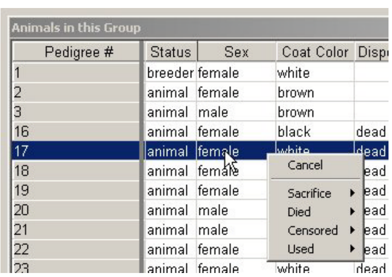
Tip: You can't change Group, Cage # or Age in the Edit Animals window.

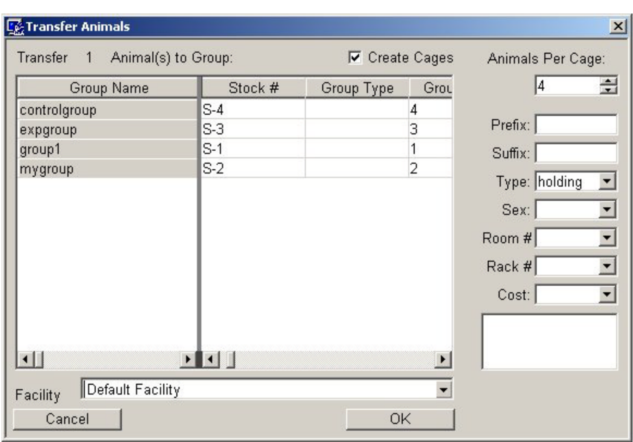
Editing Animals - Animal Disposition (Death, Used, and Censoring)





Areas throughout FACILITY use animal dispostion for various calculations, such as IACUC protocol used numbers and Kaplan-Meier analysis. When you use Edit Animal or Edit Animals, you can use the "disposition" drop-down list customized in the Global Lists window (press Lists on the menu toolbar). In order to mark animals as dead using this list, you must add a "dead" item (all lowercase) to the list; in order for the death to be properly recorded, you must manually set a death date and death cause. Another option is to select one or more animal records in the Animals in Group window, then right-click within the selection. This will bring up the disposition dialogue box, where you can mark animals as Sacrificed, Dead, Censored, or Used. Holding the mouse pointer over one of these items will allow you to set death date to Today, a different date, or to undo the selection. If you click on Sacrifice or Died, the animal will be marked as dead and its death date will be set. The Died option will allow you to set a cause of death from the Cause drop-down list (which is a customizable Global list); sacrificing an animal will set the cause to "sac." A censored animal will also receive a death date, but will be treated differently in Kaplan-Meier analysis. For example, you would mark an animal as censored if it was killed by another animal, and did not die from the treatment for which it was being studied. Note that you can set the death date manually, but this will not be recorded as an animal death (unless you also manually change the disposition).





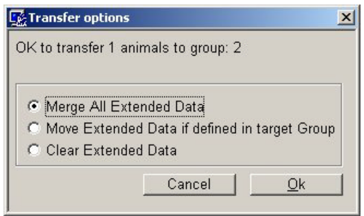
Transfer

Select one or more animals in the Animals in Group window, then press Transfer to move those animals to another group. When you move animals to a new group, cages will automatically be created for those animals based on the cage specifications you enter (if you have checked the "Create Cages" box). You can choose to move the selected animals to a group in a different facility by using the Facility drop-down list at the bottom of the Transfer Animals window. Once you press the OK button, you will be given a list of transfer options. See Common Procedures for information on selecting multiple items.

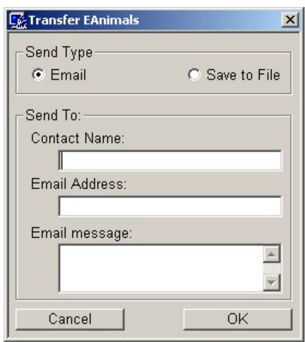
Tip: Cages are group-specific; animals are "kicked out" of their current cages when transferred between groups. You have the choice to create new holding cages for animals when you transfer them.

EAnimals

EAnimals allows you to send animal records as text files that can be automatically received into your database. Note that once records have been sent, they will no longer appear in FACILITY. EAnimals is a method of permanently moving animal records: if you wish to send or save a copy of animal record information instead, you should use Reports.



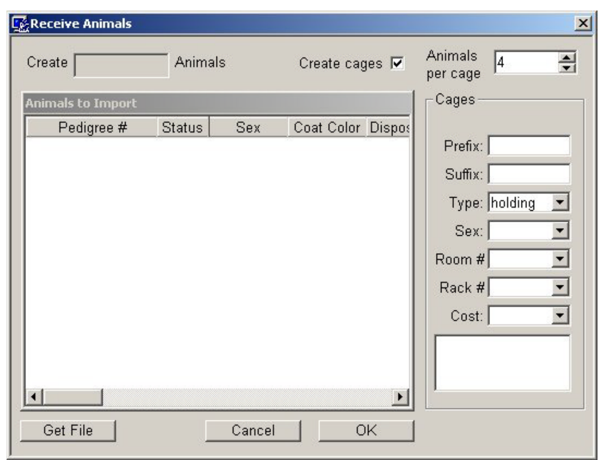
Tip: The text file that results from sending an animal record or saving an animal record to file is specially formatted to be recognized by FACILITY. Do not edit this file manually.



Send - Check the Email box to email the selected animal record(s). You will be able to enter a contact name, an email address, and a message. Once you press OK, it might take some time to compile the .txt files. The files will then be sent to the selected recipient. Check the Save to File button to save the selected animal record(s) to your computer. Choose the correct directory, enter a name for your record file, then press Save. You must have an animal selected before you can use Send.

Tip: Animal records are treated like physical animals: only one distinct record can exist for an animal (to prevent confusing double entry down the line), and thus the record can only be used by one database at a time.

Receive - Press Receive to add animal records to the selected group from a file previously created using the EAnimals Send command. If you receive a file by email, save the file to your hard drive first. Press Get File, then select the desired file from the appropriate directory. The new animal record(s) will appear in the Animals to Import window. Check the "Create Cages" box if you wish to create holding cages for the new animals. Press OK to enter import these new animal records into FACILITY.

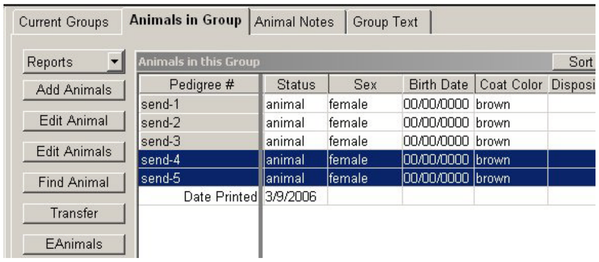


Tip: When you receive an animal record, all data items will be preserved, but some might not make sense if the User fields have been configured differently.

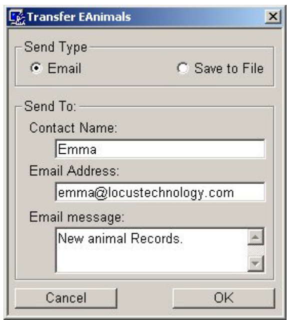
Cancel - Press Cancel to exit EAnimals without making changes.

Tutorial: Using EAnimals to Send and Receive Animal Records

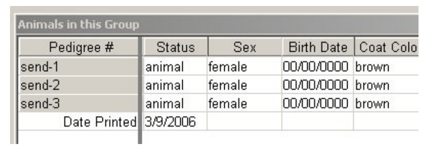
Assignment: You want to send a record to another researcher. See the "Creating a Group, Adding Animals to Group" tutorial for more information.



1. Create a two new groups called "send" and "receive."
2. In the "send" group, create five animals, complete with a small amount of animal data.
3. Select the last two animals, and press EAnimals. Choose the Send option.
4. Make sure the Email box is checked.
5. For this tutorial, you will also be the receiving researcher. Enter your email address in the Email Address window, and a contact name and message if you like.

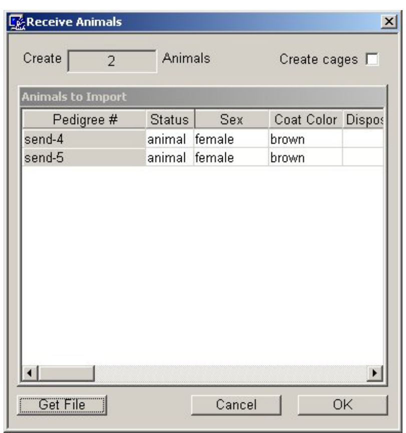


6. Press OK to send the selected animal records. FACILITY will verify your request. (Alternately, you can save the .txt file to a directory on your computer. Check the "Save to File" box and choose a location to save to and load from.)

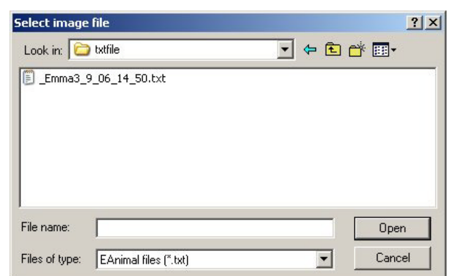


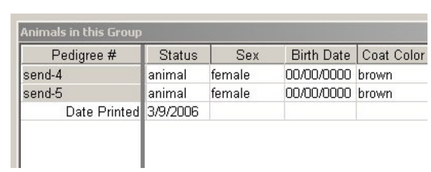
Tip: Your computer might open a window that states "A program is trying to automatically send e-mail on your behalf." Press Yes to allow this email to be sent.

7. Once the animal records are sent, they will no longer appear in the group "send."
8. Open your email account, and save the animal record file to an appropriate directory.
9. In the Group Manager, select the Current Groups tab-page. Click on the group "receive," then go to the Animals in Group tab-page. This group should be empty.



10. Press EAnimals, and choose the Receive option.
11. In the Receive Animals window, press Get File.
12. Select the animal records file you created previously, then press Open.
13. The sent animal records will now appear in the Receive Animals window. Create cages if you want; press OK to accept the imported animals.
14. The imported animals will now appear on the Animals in Group tab-page
.





Toolbox

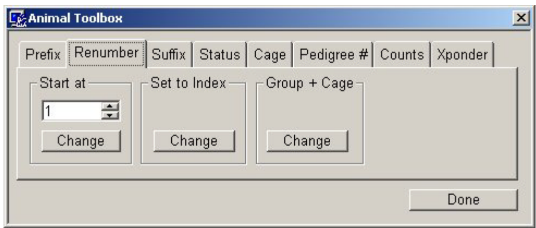
The Toolbox provides powerful tools for resetting animal information for multiple selected animals, such as pedigree number (including prefix and suffix), status, and transponder codes.

Tip: It's a good idea to limit Toolbox use to administrators.

Prefix - Pedigree numbers appear in the form prefix - animal index number - suffix. You can set these values manually when you create one or more animals, or you can have FACILITY set them for you automatically (within a group) by entering text into the “prefix” field when creating/editing a group. Use the Prefix function in the Toolbox to change the prefixes for all selected animals.

Tip: If you’ve changed the text in the “prefix” field of the Edit Group window, the new text will automatically appear in the New Prefix window of the Toolbox.

Renumber - FACILITY automatically assigns an animal index number as the middle part of the animal pedigree number. This is the number used to locate an animal when you press Find Animal. Use the Renumber function to change this number for all selected animals. There are three different methods of renumbering animals. You can renumber your animals consecutively starting at a given index number. Or, you can reset the index number for each animal to its UID, a unique, uneditable number used to identify the animal within the FACILITY database. The UID is listed when you add or edit an animal at the top of the window, and also in the Animals in this Group window at the far right. You can also create identifiers for the animals in the form (Group Number)(Cage Number). For example, if the group number is “2” and the cage number is “12,” the new animal index number will be “212.”



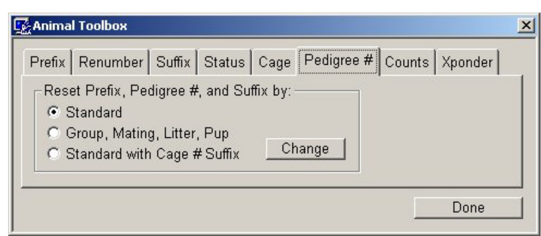
Suffix - Use Suffix to change the pedigree suffixes for all the selected animals. You can reset suffixes for selected animals manually, or set all animal suffixes to their cage numbers.

Status - Toggle the selected animals between “animal” and “pup” status. Note that using this function can affect animal breeder status.

Tip: If you use the Cage Manager to manage animal breeding, the usual method for turning pups into animals will be to move them from mating cages to holding cages.

Cage - The cage number for an animal does not appear when you add or edit a single animal; it does, however, appear in the Animals in this Group window. The Clear Cage # function sets the cage numbers for the selected animals to 0. This function provides a quick way to remove several animals from cages. They will no longer appear in cages in the Cage Manager; they will appear in the Animals to Assign window on the Assign tab-page of the Cage Manager. Use this function, for example, when your animals have been used and you wish to empty the cages so you can put new animals in those cages.

Pedigree # - This function contains a list of specific pedigree numbering systems. The “Standard” system renumbers all animals starting at animal index number “1,” with no prefix or suffix. The “Group Mating Litter Pup” incorporates all of these items into the pedigree number. The “Standard with Cage # Suffix” system is the same as the Standard system, but adds to the pedigree number the current cage number as a suffix. Note that the suffix portion of the animal pedigree number will not change automatically if you move the animal record to a different cage.



Tip: When you use the Toolbox to change animal pedigree numbers, you should be careful not to create duplicates. Also, note that changing pedigree numbers manually could make it difficult to consistently identify animals in the future.

1. Group Manager

Counts - Add or subtract animals from the “protocol used” count.

Xponder - Upload or clear custom transponder numbers.

Selected Count, Male/Female

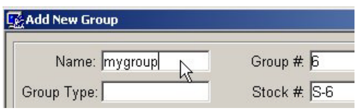
Selected Count displays a ratio of the number of animals selected to the number of animals not selected. Male/Female shows a ratio of the number of males to the number of females in the selected group.

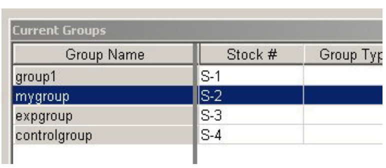
Animals in Group, Breeders, and Available

See section 1.1 for information about these displays.

Tutorial: Creating a Group, Adding Animals to Group

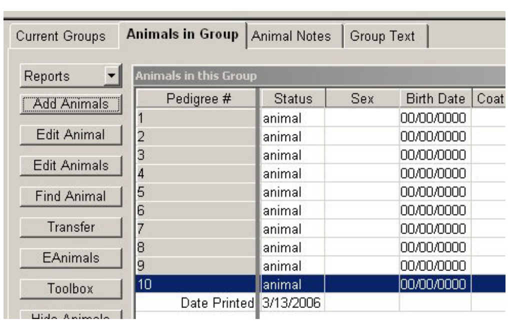
Assignment: You have just received 10 animals. Create a group for these animals and assign them to it.



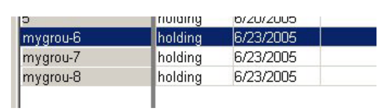


1. In the Group Manager, select the Current Groups tab-page.
2. Press the New Group button.
3. Name your group “mygroup,” and enter any additional group information. “Prefix” and “Suffix” data will be applied to any new animal records when they are created in this group. Charges will be applied to the selected account; animals used will be attributed to the selected protocol. (Find more information in the chapters on the Account and IACUC Managers.)
4. Press OK to add your new group to the list of groups on the Current Groups tab-page.

5. Select the group in the Current Groups window, and then go to the Animals in Group tab-page.
6. Press the Add Animals button.



7. Set the animal counter to Create 10 Animals. For this example, keep the default of Create Cages, four animals per cage.
8. Enter any additional information, then press OK to save changes.
9. Go to the Cages tab-page of the Cage Manager to view the newly created cages.

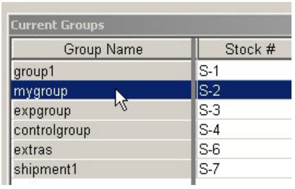


Tutorial: Editing a Group and Transferring Animals

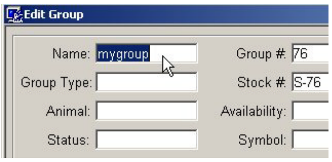
Assignment: You have decided to use “mygroup” for a study on aging. Also, you have received a shipment that contains two more animals you want to add to the aging study group.

1. Create a new group called “shipment1.” Enter “ship-1” into the Prefix field.

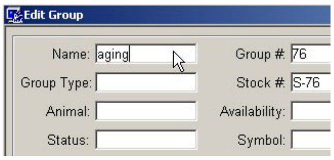
2. Add two animals to this group.



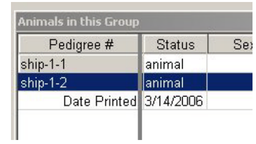
3. On the Current Groups tab-page, select “mygroup.” Double-click on the name, or press the Edit Group button.



4. In the Edit Group window, change the name of the group to “aging”. Press OK to save the change.

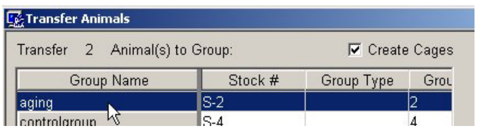


5. Select “shipment1” in the Current Groups window and go to the Animals in Group tab-page.



6. Select both animals in “shipment1,” then press the Transfer button.

7. Choose “aging” out of the list of current groups, then press OK to transfer the selected animals.

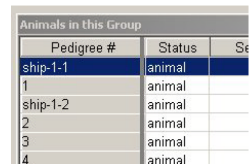


8. Check your desired transfer options, and press OK.

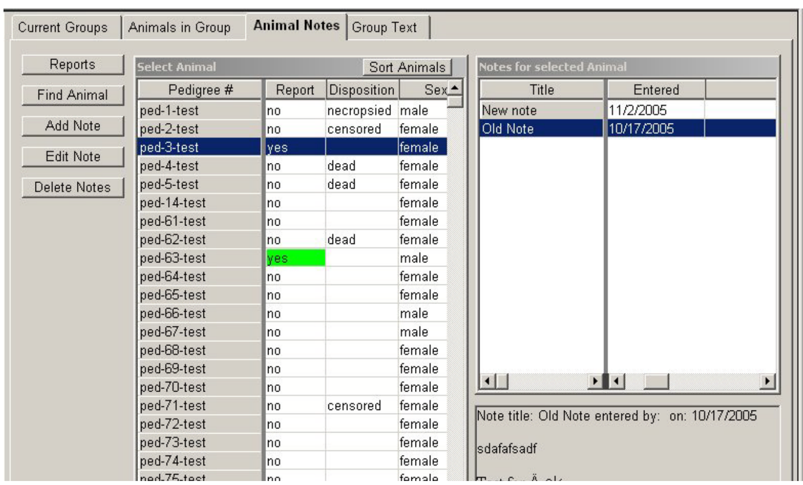
9. “Shipment1” will no longer contain animals after the transfer; no animals will appear in the Animals in Group window.

10. Go to the Current Groups tab-page, and select “aging.”

11. On the Animals in Group tab-page, you will now be able to see the two new animals in this group.



12. Select the animals in this group, then press Toolbox. Go to the Prefix tab-page, and enter “aging” as the new prefix.



1.3 Animal Notes

This tab-page is new to FACILITY version 6. Select an animal in the Select Animal window to see a list of notes associated with that animal in the upper right window. Select a note to view the note text in the lower right window. A scrollbar will appear if there is more text to display.

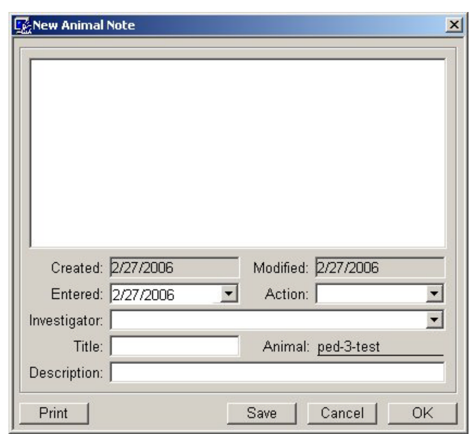
Reports, Find Animal, Edit Note

See Common Procedures.

Add Note

Select an animal, then press Add Note to create a new note record. Type the note directly into the provided text box, or paste text from another location. Enter any other desired information, then save and press OK.

Tip: This tool allows you to enter generic information for the selected animal. FACILITY provides specific managers for tracking health, assessments, study information etc.

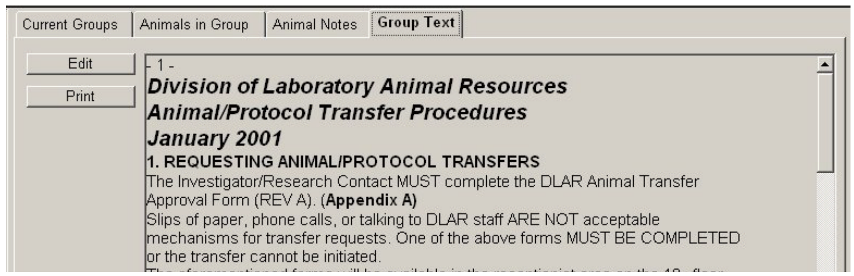


Delete Notes

Select an animal, then select one or more notes to permanently delete them from the database.

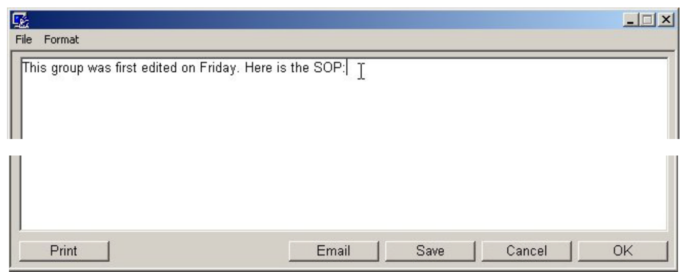
1.4 Group Text

Use this page to view or enter comments, standard operating procedures etc. for the selected group.



Edit

Press Edit to open an editing window for group text. Enter text directly into the provided text box, or paste text from another location. You can also Print or Email your text from this window. Press Save to preserve your changes, and press OK to close this window.



Print

Click on Print to send your group text to a local or networked printer.

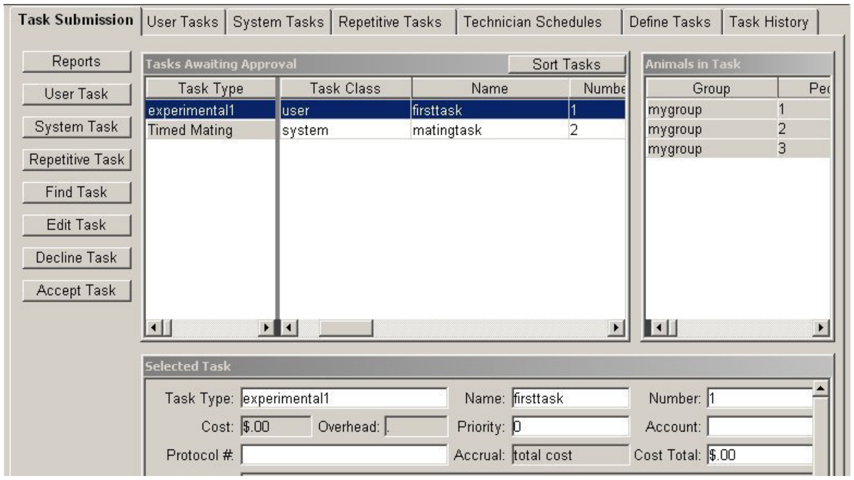
Notes

Notes

2. Task Manager

2.1 Task Submission

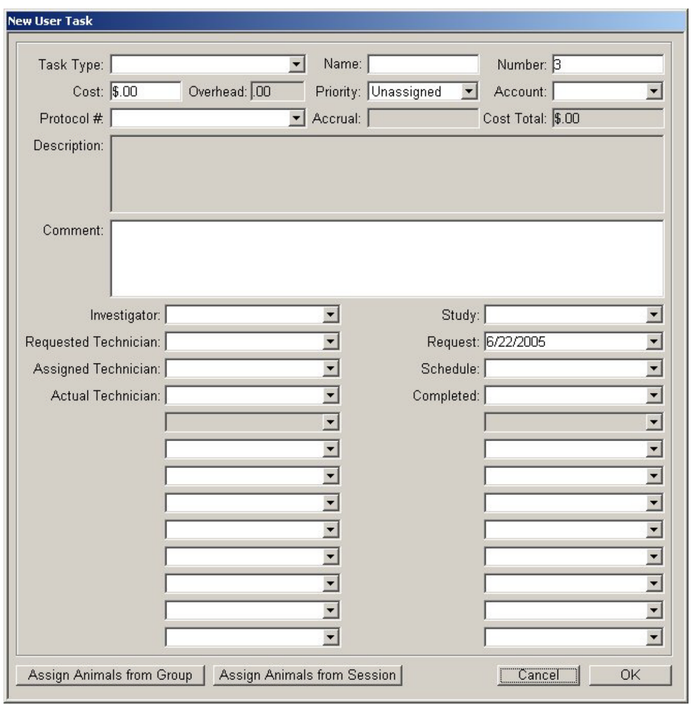
The Task Manager improves communication between investigators and the animal room, helps to maintain a record of tasks performed (or not performed), and can reduce traffic in and out of the animal room. Once you have created task definitions on the Define Tasks tab-page, you can submit those tasks for acceptance on the Task Submission tab-page (or you can submit pre-defined System tasks). This tab-page consists of three windows. In the upper left corner, there is a list of all tasks waiting to be accepted. Once accepted, these tasks will be moves to the User Tasks, System Tasks, or Repetitive Tasks tab-page (depending on the type of task). The window in the upper right displays a list of all animals currently assigned to the selected task. The bottom window shows the details for the currently selected task.

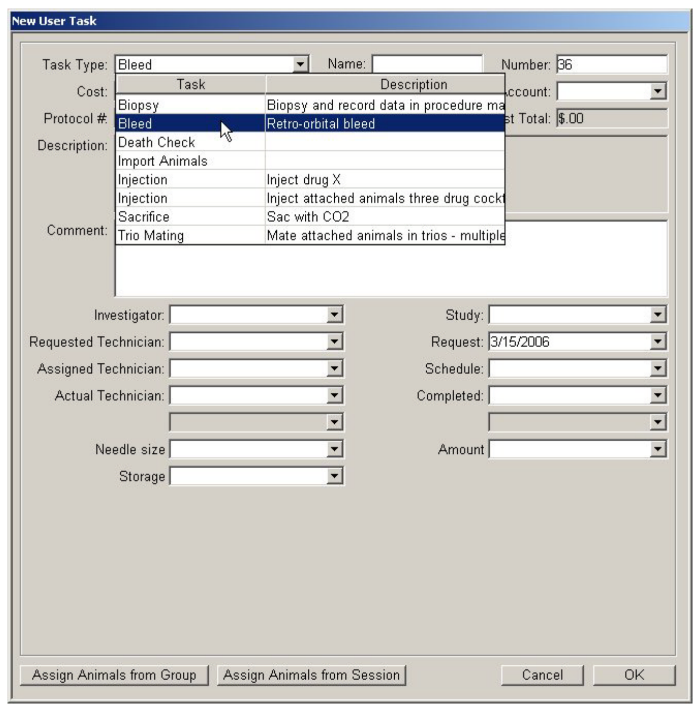


Tip: Animals can be assigned to an unlimited number of tasks.

Reports, Edit Task

See Common Procerdures.





User Task

When you first press User Task, you will see a window that looks like the one on the right. This is what the New User Task form looks like before a task definitions has been selected from the Task Type drop-down list. Before you submit a user task, you must first create a new task definition on the Define Tasks tab-page. These definitions allow you to customize your task manager, and will appear in the Task Type drop-down menu. The drop-down lists for technicians and investigators can be customized in the Team Manager. Note that you can only edit Request Technician during task submission; after acceptance, this can't be changed. Once you select a defined task from the Task Type drop-down menu, the fields you created will appear at the bottom of the window, enabled with your selected drop-down lists.

Assigning Animals from Group/Session - When you create a task for submisison, you have the choice of assigning animals to the task from a group or a session. Press Assign Animals from Group to open a new window. Select a group from the window at the bottom of the screen to view the animals in that group in the Animals to Assign from Group window.

Tip: The default group will be the one currently selected in the Group Manager.

Select the desired animals, then drag them over to the Animals Assigned to Task window. To remove animals from a task, select them and drag them back to the Assign Animals from Group window. Press Close when you are finished to exit this page. You can use the same method to assign animals from a previously created session; see the section on Sessions in the Application Framework chapter.

Tip: You must enter a Task Name before you can save a task.

System Task

Submitting a system task and assigning animals to this task works the same as creating a user task. There are currently two types of system tasks: Timed Mating and Embryo Production. Fields for data entry will appear at the bottom of the New System Task window based on the predefined task you select. Submitting a system task will create several sub-tasks on the System Tasks tab-page.

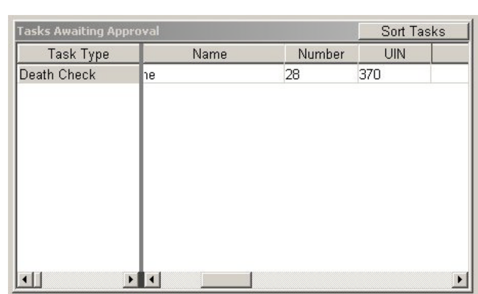
Tip: DPC (days post coitus) is required to create a Timed Mating. Cell count is required to create an Embryo Production. System tasks must be scheduled far enough in advance for all subtasks to occur.

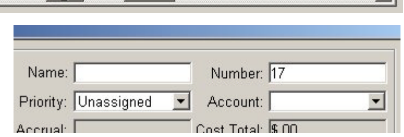
Repetitive Task

Repetitive tasks are similar to User Tasks. You can define repetitive task types on the Define Tasks tab-page. The main difference between the two is that you can enter a repetitive day and repetitive period for repetitve tasks. These tasks will reappear regularly on the Repetitive Tasks tab-page.

Tip: Tasks can be repeated daily, weekly, every 2 weeks, every 3 weeks, or monthly. If you select daily, the repetitive day field will appear blank.

Find Task





Use Find Task to locate a task by its unique identification number. The UIN is assigned automatically by the system based on the order in which tasks are created. Note that when you create a system or repetitive task, several task instances appear on the respective tab-pages. Because of this, the number that appears in the upper right corner when you create a task does not necessarily correspond to the UIN. (In addition, the task Number is editable).

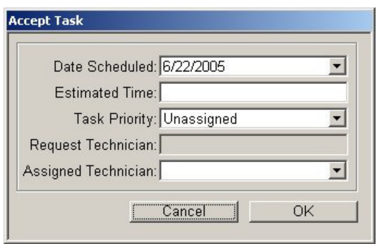
Tip: Search for tasks by UIN, not by Number. The UIN appears in the Tasks Awaiting Approval window, but not when submitting or editing a task.

Decline Task

If the task cannot or should not be performed as specified, the user can decline the task by selecting it and pressing Decline Task. The task will still appear on the Task History tab-page, with a status of "Deleted." Once a task has been declined, there is no way to resurrect it. You will be asked to verify your decline decision before the task is deleted.

Accept Task

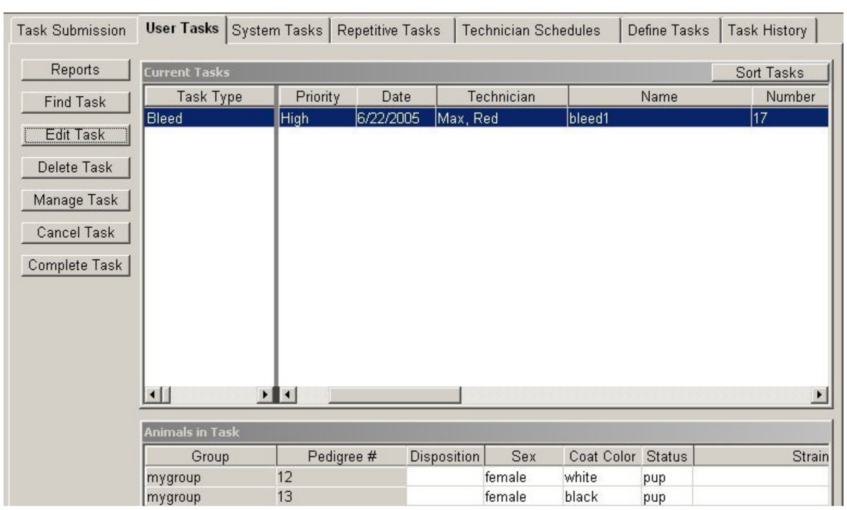
Once you press Accept Task, the task will be transferred to the appropriate tab-page: User Tasks, System Tasks, or Repetitive Tasks. The task can now be edited, managed, canceled, deleted, or completed from one of those tab-pages. When you accept a system task, several sub-task records will be created. "Date scheduled" displays the date on which the last sub-task of the system task is to be performed. Note that tasks do not appear on the Technician Schedules page until they are accepted; once they have been accepted, you are free to change the assigned technician any time before task completion.



Tip: You can only accept or decline one task at a time.

Sort Tasks

A Sort Tasks button appears in the upper right corner of this tab-page. See Common Procedures for information on Sort.



2.2 User Tasks

The User Tasks tab-page is composed of two windows. The Current Tasks window displays all user tasks that have been submitted and accepted on the Task Submission tab-page. The Animals in Task window shows all animals that have been assigned to the currently selected task. You can edit both the task and animals in the task from this tab-page.

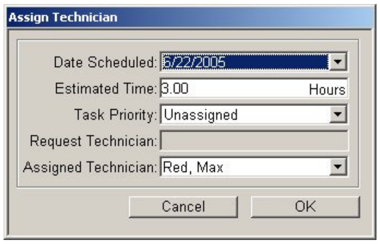
Reports, Edit Task, Delete Task

See Common Procedures.

Find Task

See section 2.1.

Manage Task



Click on Manage Task to open an Assign Technician window. This is the same window that appears when you press Accept Task on the Task Submission tab-page. From here you can set task priority and assign a technician. When you edit the technician assignment, the Technician Schedule tab-page will automatically update. Some of these functions can also be performed by pressing the Edit Task button.

Cancel Task

Press Cancel Task to cancel the selected task. The task will appear on the Task History tab-page as "Canceled."

Complete Task

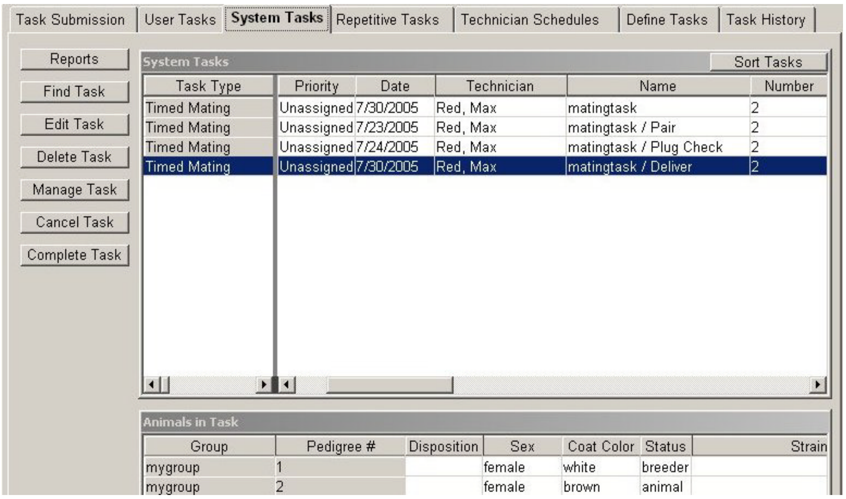
Once a task has been performed, select the task and click on Complete Task. The task will be transferred from the User Tasks tab-page to the Task History tab-page. It will be marked as "Completed."

Sort Tasks

A Sort Tasks button appears in the upper right corner of this tab-page. See Common Procedures for information on Sort.

2.3 System Tasks

System tasks are predefined in FACILITY. They are generally more complex than user or repetitive tasks, requiring several stages of completion over a period of time. When you create and accept a system task on the Task Submission tab-page, all of these sub-tasks will appear in the System Tasks window. A timed mating will create 4 separate sub-tasks: Pair, Plug Check, Deliver, and a final task. An embryo production will create 5 separate tasks: PMSG, hCG + Pair, Plug Check, Harvest, and a final task. The animals assigned to each system task appear below in the Animals in Task window.



Reports, Edit Task, Delete Task

See Common Procedures.

Find Task

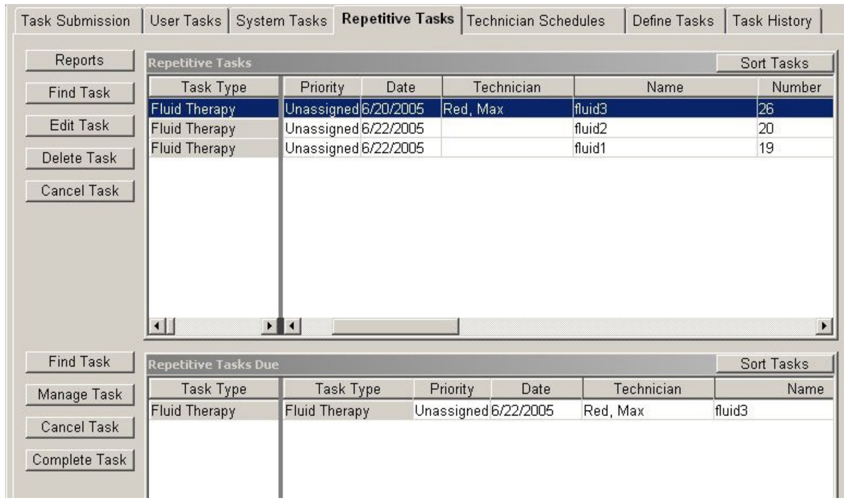
See section 2.1.

Manage Task, Cancel Task, Complete Task, Sort Tasks

See section 2.2.

2.4 Repetitve Tasks

The Repetitive Tasks tab-page provides a place for you to keep track of tasks that occur on a regular basis. The Repetitve Tasks window displays a list of repetitve tasks that have been submitted and accepted on the Task Submission tab-page. When it comes time for a repetitve task to be due, it will appear in the Repetitive Tasks Due window.



Tip: Tasks will not disappear from the Repetitive Tasks Due window until they have been cancelled or completed.

Dealing with Repetitve Tasks is different than dealing with System or User Tasks. If you delete or cancel a repetitive task, the task will be removed from the Repetitve Tasks window, and repeat tasks will no longer appear in the Repetitive Tasks Due window. Therefore, only delete or cancel a repetitive task if you no longer need it performed. To remove any current instances of the task from the Repetitive Tasks Due window, use the Cancel and Complete buttons in the lower half of the tab-page.

Tip: You must enter a period before you can accept a repetitive task.

Reports, Edit Task, Delete Task

See Common Procedures.

Find Task

See section 2.1. Choose to search through all repetitve task records (upper window) or all repetitve tasks due (lower window).

Tip: Each Repetitive Task Due has its own UIN.

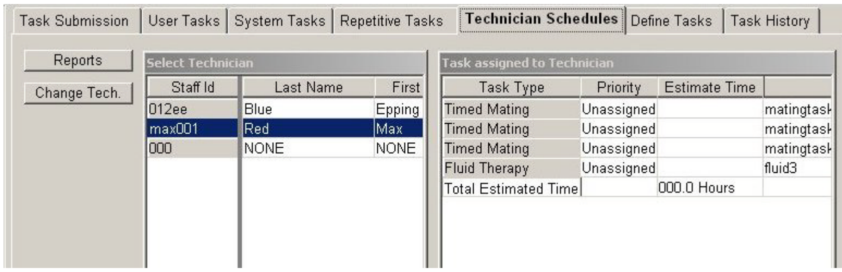
Cancel Task

Press the upper "Cancel Task" button to cancel a repetitve task record (upper window); press the lower "Cancel Task" button to cancel a repetitive task due (lower window).

Manage Task, Complete Task

See section 2.2 for information about managing tasks.

Tip: Completing a due repetitive task removes the record from the Repetitve Tasks Due window, but does not affect the task in the Repetitve Tasks window.



2.5 Technician Schedules

Any staff members entered on the Staff tab-page of the Team Manager will appear in the Select Technicians window. Select a technician to see a record of his or her scheduled tasks in the Task Assigned to Technician window. There is also a Total Estimated Time field at the bottom of a technician's list of tasks. Once a task has been cancelled, deleted or completed, it will no longer appear in the Task Assigned window.

Reports

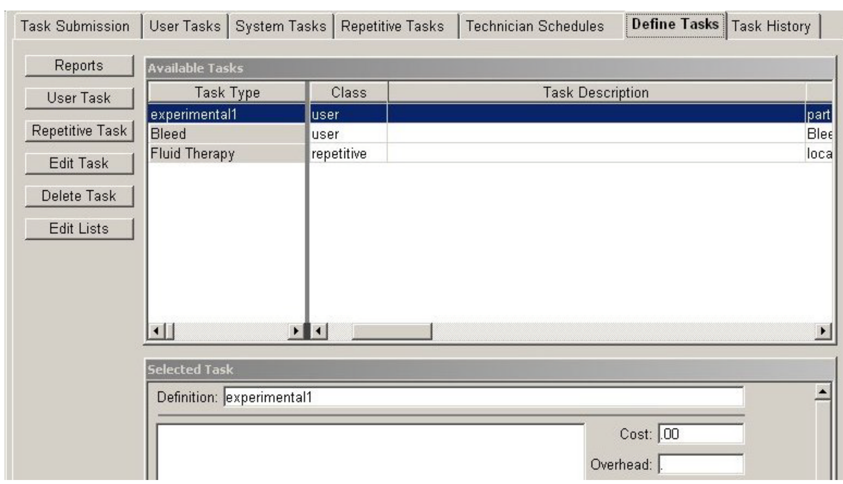
See Common Procedures.

Change Technician

Select a technician, then select a task assigned to that technician. Click on Change Technician to transfer this task to another staff member.

2.6 Define Tasks

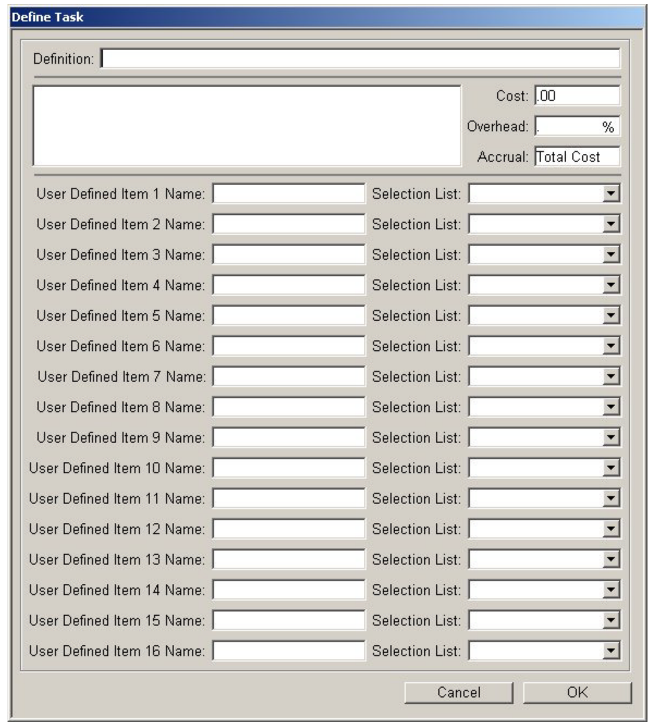
The Define Tasks tab-page lets you customize user and repetitive task definitions. Available Tasks shows all the tasks that have been created to date. Each task is classed as "user" or "repetitive." The Selected Task window shows the definition and description of the selected task type, along with any user-defined fields or lists. The first step of the task-defining process is to create drop-down lists for user-defined categories by pressing Edit Lists. Once you have customized drop-down lists for your planned task types, you can build your task types by clicking on User Task or Repetitive Task.



Tip: User Task and Repetitive Task are two seperate categories. A repetitve task type can't be used to create a user task on the Task Submission tab-page, and vice versa.

Reports, Edit Task, Delete Task

See Common Procedures.

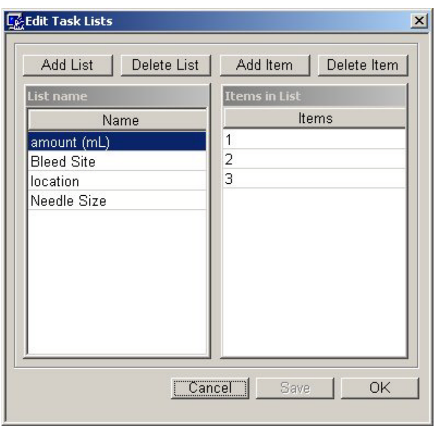


User Task

Click on User Task to open a new Define Task window. From here, you can enter a definition for your new user task type. All user task types created in this way will appear in a drop-down list when you create a new User Task on the Task Submission tab-page. You can enter up to sixteen user-defined items that will become fields in your new task type. Create selections lists for these fields using the Edit Lists function described below. In the upper-right corner you can assign a cost (either total or per animal) and an overhead that will go into account calculation on the Task Charges tab-page of the Account Manager. A per-animal charge will be assessed every time you add an animal to a task of this type.

Repetitve Task

Use the same method to create a repetitive task type as you did to create a user task type.



Edit Lists

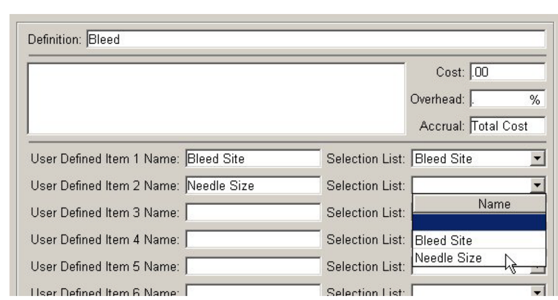
To create a new list, press Add List and type the desired list name into the provided field. While the list is selected, you can add list entries by pressing Add Item and typing the desired item name into the provided field. Once you are done entering items, press Save. Click on OK to close the Edit Task Lists window, or press Cancel if you do no want to save your changes. Use the Delete List and Delete Item buttons to delete selected entries.

Tip: You cannot delete a list unless all items have been removed from the list.

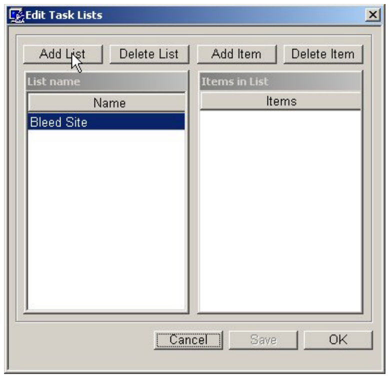
Tutorial: Defining a Task Type and Submitting a Task

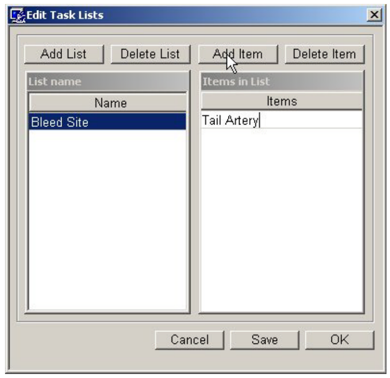
Assignment: You are performing a Bleed user task.

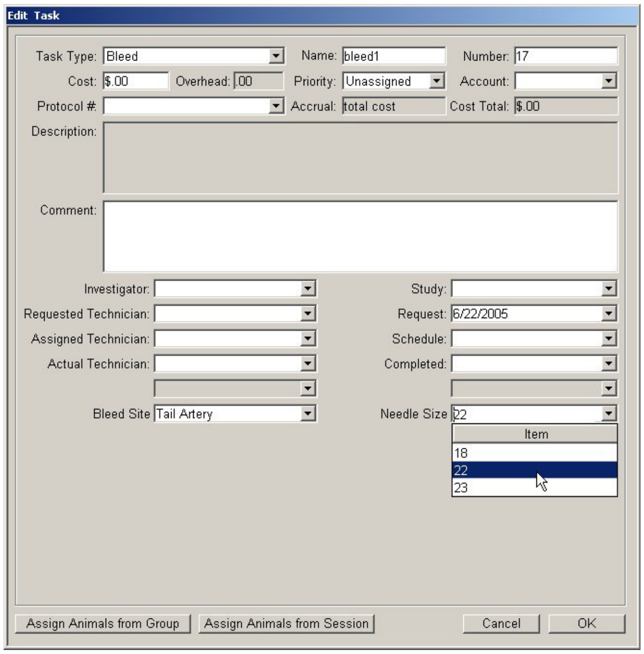
1. In the Task Manager, select the Define Tasks window.
2. Press Edit Lists to create drop-down lists for your user-defined fields.
3. Press Add List, then enter "Bleed Site" in the List name field.
4. Press Add Item, then enter "Tail Artery" in the Items in List field.
5. Add "Saphenous Vein" as another item to the list.
6. Use the same method to create a Needle Size list with items 18, 22, and 23.



7. Press Save, and then OK to exit the Edit Task Lists window.
8. Press User Task to open a new Define Task window.
9. Enter the name “Bleed” in the Definition field.
10. Type “Bleed Site” into User Defined Item 1 Name.
11. Type “Needle Size” into User Defined Item 2 Name.
12. Choose the corresponding lists for the Selections Lists.

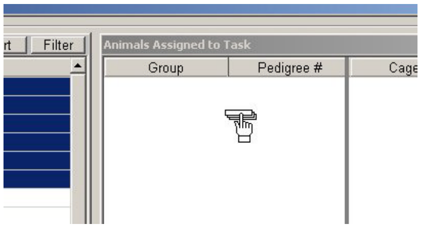


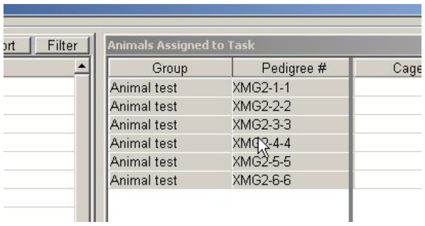




13. Press OK to save the task type. Bleed will now appear under Available Tasks.
14. Select the Task Submission tab-page.
15. Click on User Task, and set the task type to Bleed.
16. Enter “bleed1” as the task name.
17. Select the desired values for bleed site and needle size from the provided drop-down lists.
18. Use either the Assign Animals from Group or the Assign Animals from Session button to assign animals to the task.
19. Select the desired session or group from the list at the bottom of the Assign Animals to Task window.
20. Select one or more animal records in the Animals to Assign from [group or session] window. (See Common Procedures for selecting multiple items).

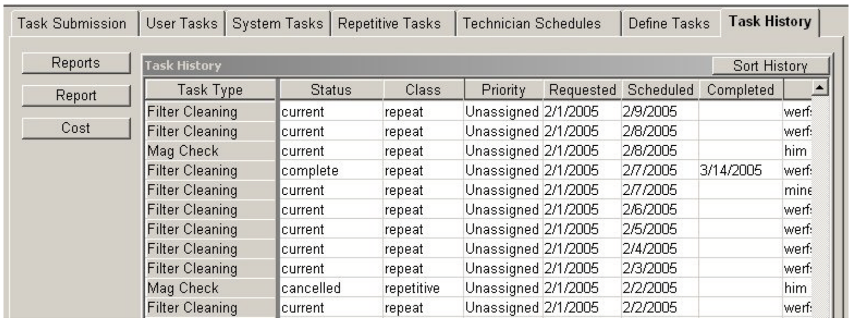
20. Drag animal records from the group or session window to the Animals Assigned to Task window to assign animals to the current task. Note that this window may contain animal records if animals have previously been assigned to this task.
21. To remove one or more animals from the current task, drag animal records from the Animals Assigned to Task window to the group or session window.
21. Once you are satisfied with the animals assigned to the task, press Close to close the Assign Animals window and save changes
22. Press OK to submit the task. Bleed1 will now appear under Tasks Awaiting Approval.
23. To approve the task, select it and press Accept Task. Bleed1 will be sent to the User Tasks tab-page.
24. Press Decline to get rid of this task.
25. Go to the User Tasks tab-page to perform additional functions on bleed1.





2.7 Task History

The Task History tab-page displays a history of all new, current, deleted, cancelled and completed tasks. New tasks are those that have been submitted but not yet accepted; they appear on the Task Submission tab-page. Current tasks have been submitted and accepted; they appear on the User, System, or Repetitve Tasks tab-pages depending on their class. Deleted, cancelled and completed tasks no longer appear on their respective tab-pages.



Tip: The Task History tab-page contains a lot of useful information, such as the dates a task was scheduled for and completed (or declined), the associated protocol (if there is one), and records of the requested, assigned, and actual technicians for the task.

Reports

Reports displays a complete list of the tasks entered to date. See Common Procedures for more information on Reports.

Report

Report displays a complete list of the tasks entered to date, along with a picture of the task form for the selected task and a list of any animals assigned to that task. See Common Procedures for more information on Reports.

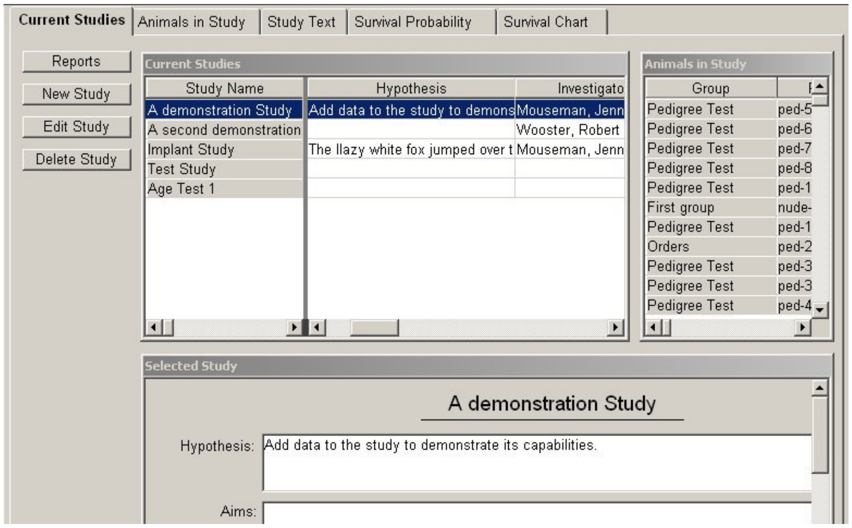
Cost

Cost displays a list of tasks focusing on the cost for all tasks. Price amounts are calculated from price entries made during task submission and editing. See Common Procedures for more information on Reports.

Notes

Notes

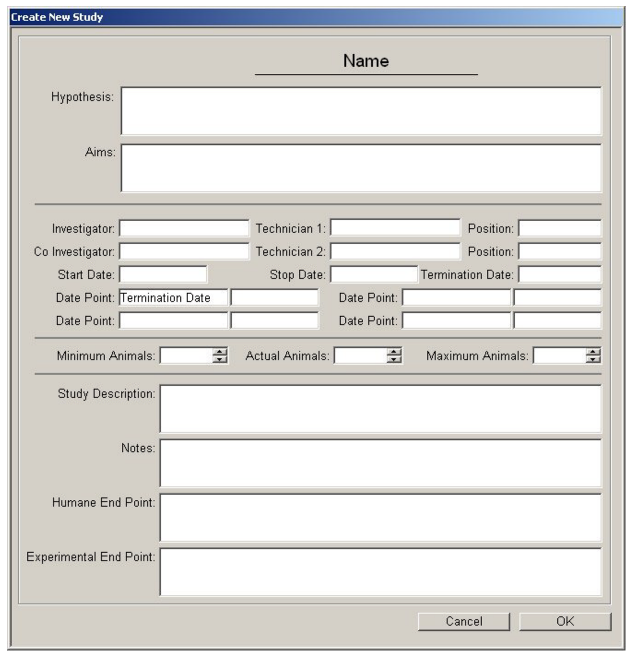
3. Study Manager



3.1 Current Studies

The Study Manager allows you to keep track of experimental studies for your facility. Studies are recorded in the Current Studies window. Animals assigned to the selected study appear in the Animals in Study window to the right. The form for the selected study appears at the bottom of the tab-page so you can easily view study details. Note that you can't edit information in the Selected Study window.

Tip: You must go to the Animals in Study tab-page to assign animals to a study.



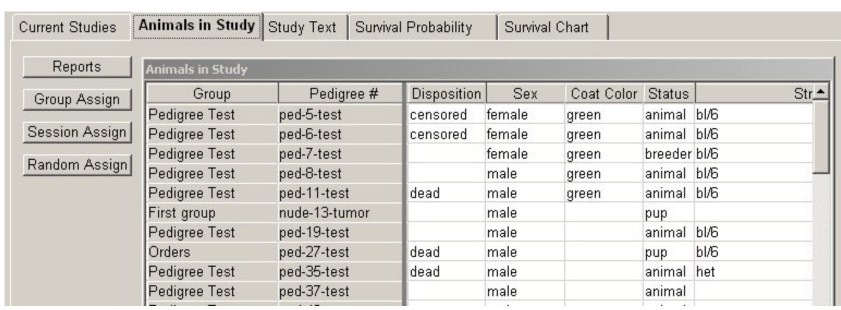
Reports, Edit Study, Delete Study

See Common Procedures.

New Study

Press the New Study button to open a Create New Study window. The cursor starts out on the underlined title ("Name" by default) which you can edit by typing over. The drop-down lists for investigators and technicians can be edited in the Team Manager. If you wish to enter additional information for your study, go to the Study Text tab-page.

3.2 Animals in Study

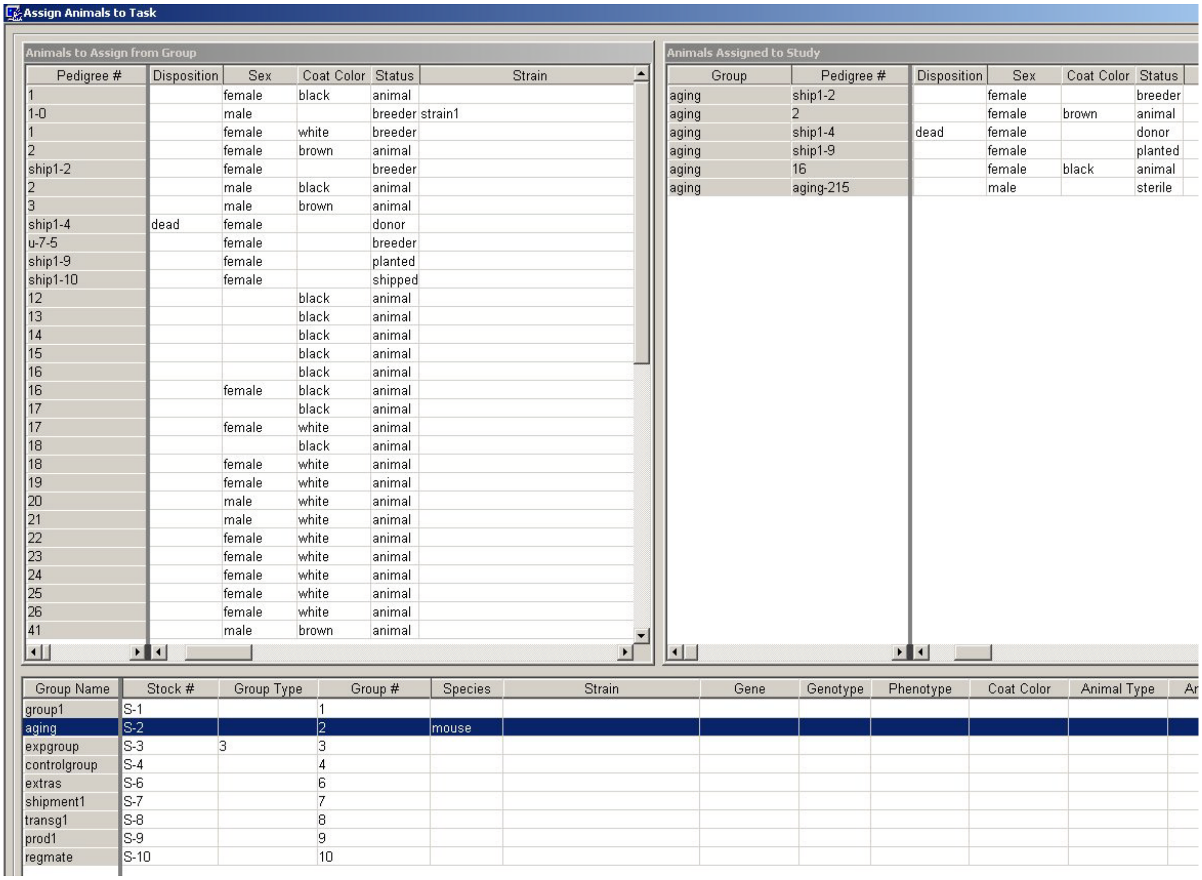


From this tab-page you can assign animals to the study selected on the Current Studies tab-page. There are three methods for animal assignment: assignment from group, assignment from session, and random assignment from group. This tab-page shows a list of animals currently assigned to the selected study, as well as a count displaying the number of animals assigned in the lower left corner.

Reports

See Common Procedures.

Group Assign

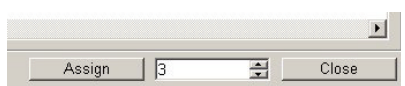


Press Group Assign to assign animals to the currently selected study. A new window will appear for animal assignment. First select a group from the list at the bottom of the window. Then choose one or more animals from the Animals to Assign from Group display and drag them to the Animals Assigned to Study list. To remove animals from the study, drag them from the Animals Assigned to Study window to the Animals to Assign from Group window. Press Close when you are satisfied with your animal choices.

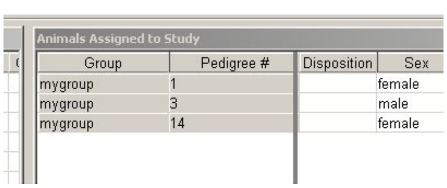
Session Assign

If you have previously created animal sessions, press this button to access a list of sessions and the animals that are part of those sessions. Assign these animals as you would animals from a group.

Random Assign



It can be useful when performing experiments to randomly assign animals from a given group. Select the study you wish to assign animals to, then press Random Assign to open a new assignment window. Choose a group from the groups list at the bottom of the window. In the lower right corner of the window, next to the Close button, you will see a button labeled Assign and a number field. Enter the desired number of animals and then press Assign. The chosen number of animals will be randomly selected from the group and moved to the Animals in Study window. Note that if you try to assign more animals than are available, the number of

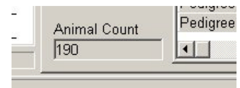


animals assigned will be equal to the number of animals available for assignment. If you try to assign four animals and the group only contains two animals (or only two animals have yet to be assigned), two animals will be assigned to the study.

Tip: If you randomly assign two animals, and then randomly assign two more animals, you will end up with four randomly assigned animals in your study. Animals will not be assigned to a study more than once.

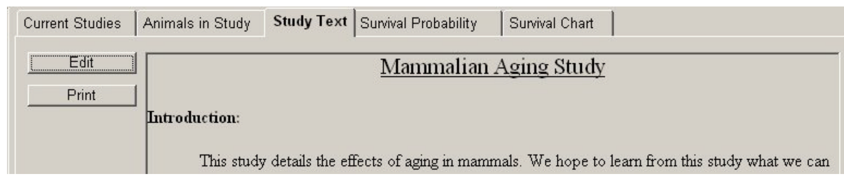
Animal Count

The number in the lower left corner of this tab-page shows you how many animals are currently assigned to the selected study.



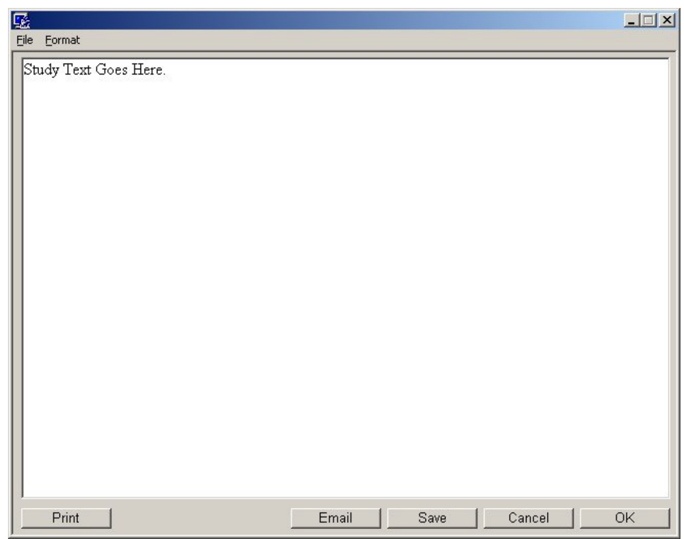
3.3 Study Text

Use this page to view or enter comments about the selected study. You can enter text directly by typing into the Edit window, or you can copy text from another source and paste by pressing Ctrl-V.



Edit

Press Edit to open an editing window for study text. Enter text into the provided space by typing directly or by copy-pasting from a preformatted source. Format text directly using the Format menu. You can also Print or Email your text from this window. Press Save to preserve your changes, and press OK to close this window. Press Cancel to exit the window without saving changes.



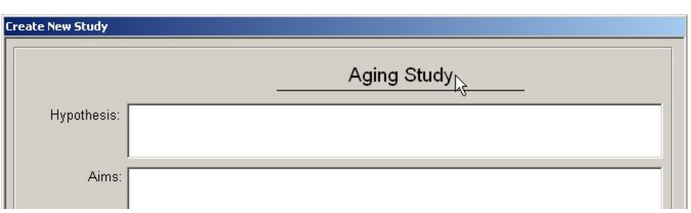
Print

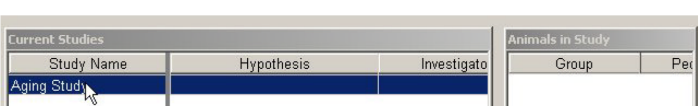
See Common Procedures.

Tutorial: Creating a Study, Assigning Animals to Study

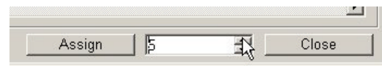
Assignment: You are performing a study on aging in mammals. Create a new study and randomly assign 5 animals to it.

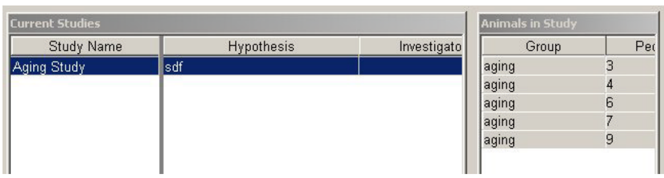
1. Click on the Current Studies tab-page of the Study Manager.



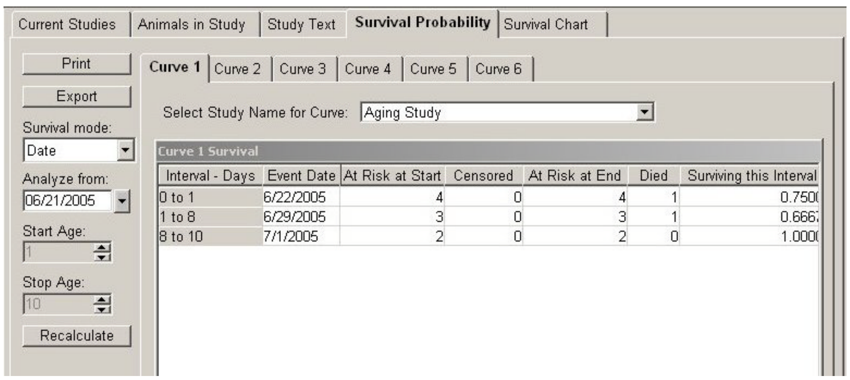


2. Press the New Study button.
3. Enter “Aging Study” as the study title.
4. Fill in the fields for your study, then press OK to create the study.
5. Select the study in the Current Studies window, then go to the Animals in Study tab-page.
6. Press the Random Assign button.
7. Select the “aging” (or a preferred group) from the groups list at the bottom of the screen.
8. Set the assign counter to 5, and press Assign.





9. Press Close to save the assignment.
10. You can now view assigned animals on the Animals in Study tab-page, as well as the Current Studies tab-page.
11. Go to the Study Text tab-page to enter text for this study.



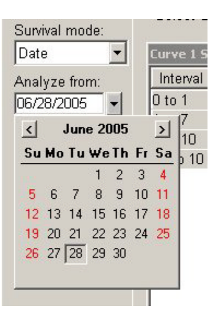
3.4 Survival Probability

The Survival Probability tab-page provides you with Kaplan Meier analysis of the survival of animals in the currently selected study. In order to make use of survival analysis, you must first mark animal disposition as “dead” on the Animals in Group tab-page of the Group Manager; see section 1.2 for information on this. (You can also mark animals as “censored” in order to perform accurate Kaplan Meier analysis.) You must also assign animals to your studies for analysis to occur. You can choose to view survival by age or from a certain date. There are six tab-pages along the top of the Survival Probability tab-page: Curve 1-6. Each tab-page can display the survival probability for one selected study, so that you can quickly switch between probability views. Each current study on a tab-page will also create a graph line on the Survival Chart tab-page.

Tip: Remember, survival probability is calculated for animals in the selected study, not for animals in the selected group.

Print

See Common Procedures.



Export

Use this button to export survival probability information in .csv format.

Survival Mode

The Survival Mode field allows you to view survival data by Age (how many days old the animals in the selected study are) or Date (how many days after the Analyze From date animals might have died).

Analyze From

If Survival Mode is set to Date, you will be able to enter a date into this field. The date you provide will be the date from which the probability starts calculation.

Start Age/Stop Age

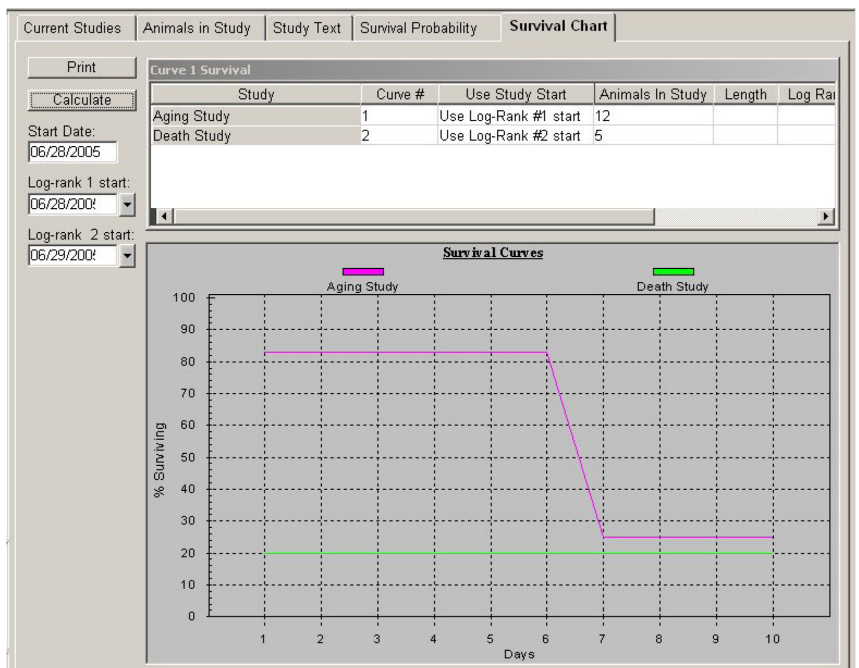
If Survival Mode is set to Age, you will be able to enter age (in days) into these fields. The ages you provide will be those used for probability calculation. Animal age at death is calculated automatically as the difference between animal birth date and animal death date.

Recalculate

Use this button to update the probability view every time you change age, date, or study for the selected curve tab-page.

3.5 Survival Chart

The Survival Chart tab-page will show you a graph comparing the survival rates of the animals in studies currently selected on the Curve tab-pages of the Survival Probability tab-page. For example, in the picture to the right Aging Study is on the Curve 1 tab-page, and Death Study is on the Curve 2 tab-page. You can compare up to six studies using Survival Chart. You must have at least two studies in order to perform analysis.

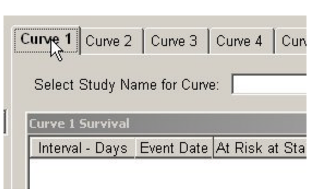


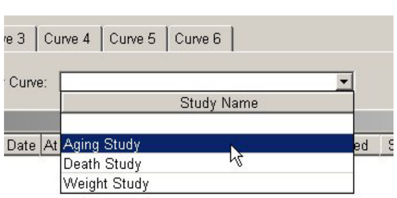
Print

Press Print to send the currently displayed chart to a local or networked printer.

Calculate

Press Calculate to bring up the graphs for the selected information.





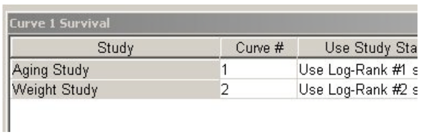
Start Age/Start Date

This portion of the tab-page will change depending on whether Age or Date is selected on the Survival Probability tab-page. The format of the graph will also change depending on whether you select Age or

Date.

Log-rank [number] start

These fields are used for calculating Kaplan-Meier survival curves. Once field will appear for each study currently being analyzed.



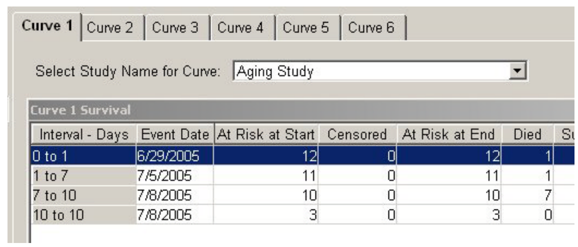
Curve 1 Survival

Study	Curve #	Use Study Sta
Aging Study	1	Use Log-Rank #1 s
Weight Study	2	Use Log-Rank #2 s

Tutorial: Calculating and Comparing Survival Rates

Assignment: Calculate survival rates for animals in your current studies, and compare the rates between studies.

1. Create at least two studies and assign animals to them. Or, use two or more studies that you already have on hand.
2. Go to the Survival Probability tab-page, and click on the Curve 1 tab-page.
3. Use the drop-down list to select your first study in the Select Study Name for Curve field.
4. Choose either Date or Age for your calculation style.
5. Look in the Curve 1 Survival window to view survival statistics.

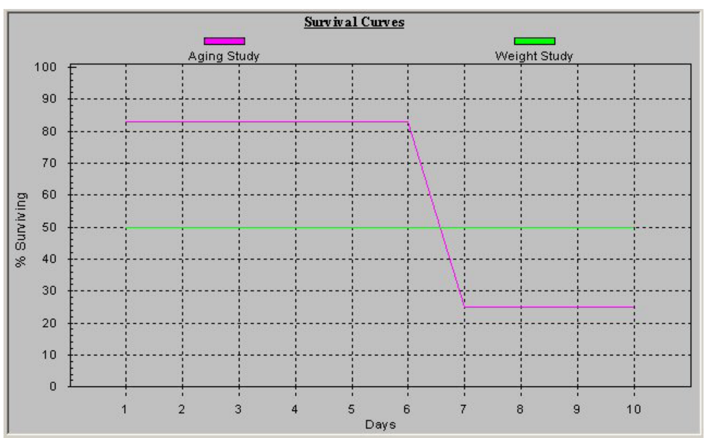


Curve 1 | Curve 2 | Curve 3 | Curve 4 | Curve 5 | Curve 6

Select Study Name for Curve: Aging Study

Curve 1 Survival

Interval - Days	Event Date	At Risk at Start	Censored	At Risk at End	Died	Su
0 to 1	6/29/2005	12	0	12	1	
1 to 7	7/5/2005	11	0	11	1	
7 to 10	7/8/2005	10	0	10	7	
10 to 10	7/8/2005	3	0	3	0	



6. Click on the Curve 2 tab-page and select your second study from the drop-down list.
7. Go to the Survival Chart tab-page.
8. Verify that both your studies appear in the survival curves window.
9. Press Calculate to view the survival charts.
10. Return to the Survival Probability tab-page to switch the view between Age and Date, or to see information for other studies.

Notes

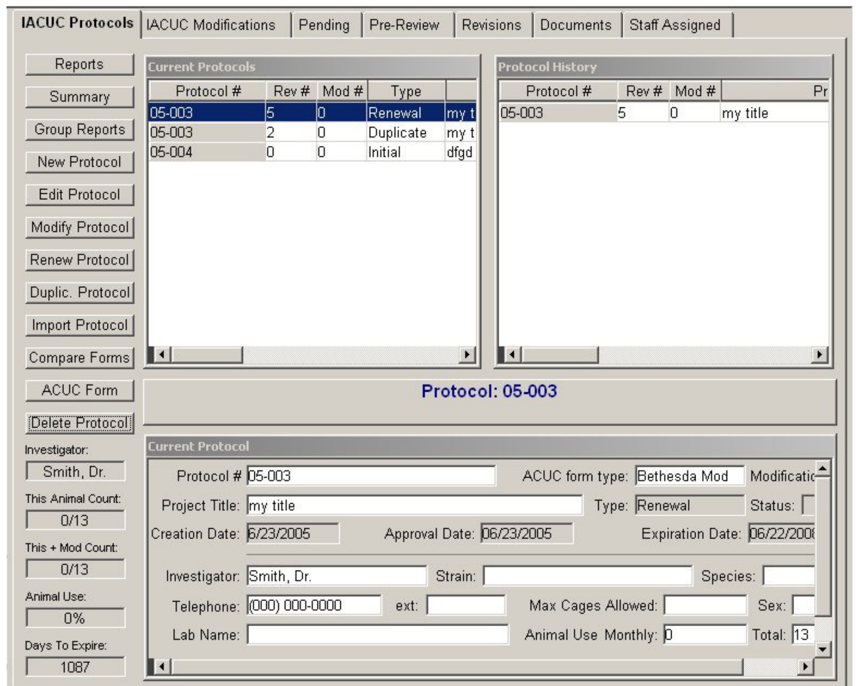
4. IACUC Manager

4. IACUC Manager

4.1 IACUC Protocols

Keep track of all your IACUC protocols on this tab-page. You can create new protocols, edit them, and manage all IACUC revisions. The Current Protocols window shows a list of all protocols that have gone through the revisions and review process. The Protocol History window shows any edits or modifications that have been made to the protocol during the review process. The window at the bottom of this tab-page shows the current form of the selected protocol. Between the upper and lower windows there is a text display that shows the number of the selected protocol. This display also shows how many modifications the protocol has (if it has modifications). Modifications for the selected protocol can be seen on the IACUC Modifications tab-page.

Tip: Protocol usage is complex and facility specific. If you have questions about using the IACUC Manager, contact Locus Technology.



Reports, Edit Protocol, Delete Protocol

See Common Procedures.

Tip: Edit Protocol will not create new modifications or revisions.

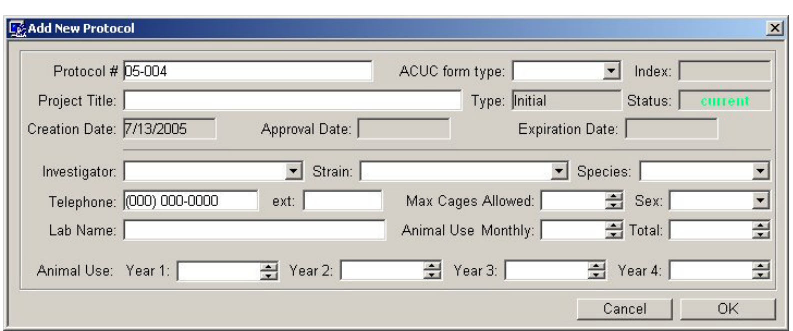
Summary

Press Summary to see a specialized report on IACUC modifications for current protocols. See Common Procedures for information on reports.

Group Reports

Press Group Reports to see a specialized report listing current protocols and all the groups that have been assigned to them from the Current Groups tab-page of the Group Manager. See Common Procedures for information on reports.

New Protocol



This is the start of a new protocol's life cycle. Press this button to create a new protocol record that will be ready for editing, modifications or revisions. Select an actual protocol form from the ACUC form type drop-down list. You can also keep track of investigator contact information and animal use information. There are two methods you can use to create an animal amount total for your protocol. You can enter a number of animals per month, which will be multiplied over three years (thirty-six months) to achieve the total. Or, you can enter the number of animals to be used each year. These amounts will be added to give you your total.

Tip: Choose one type of animal total calculation per protocol. Mixing the methods will not give you proper results.

Modify Protocol

Modifying a protocol will send a copy of the protocol record to the Revisions tab-page. Once the modification has passed through the review process, it will appear on the IACUC Modifications tab-page. You will only be able to see a protocol modification if the original protocol is selected on the IACUC Protocols tab-page.

Renew Protocol

Once a protocol has passed its expiration date, you can select it and press Renew protocol to return the protocol to active. When you a renew a protocol, the original version of the protocol will disappear from the Current Protocols window. The Renewed Protocol will have a type of “Renewal.”

Duplic. Protocol

Press Duplic. Protocol to create a copy of the currently selected protocol. Edit then press OK to send the duplicated protocol to the Revisions tab-page. A duplicate protocol starts out as Revision 0.

Tip: If you make a duplicate protocol, you probably want to rename it. Otherwise you’ll have trouble telling which protocol is which.

Import Protocol, Compare Forms

These functions have not been implemented yet.

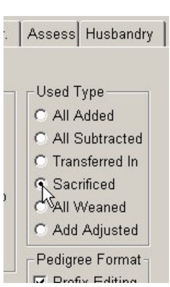
ACUC Form

Use this button if you have had customized ACUC forms made for your facility. This will open a word document that you can edit as normal. Any changes you make will be saved along with the attached protocol record.

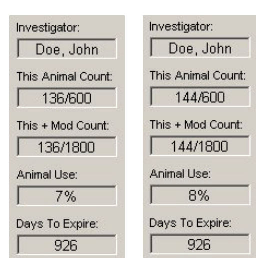
Tip: You must finish editing the form before you can return to using Facility.

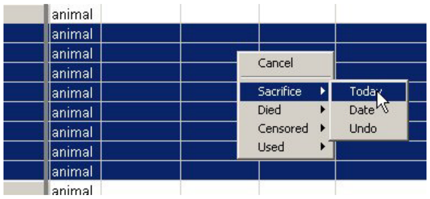
Investigator, This Animal Count, This + Mod Count, Animal Use, Days to Expire

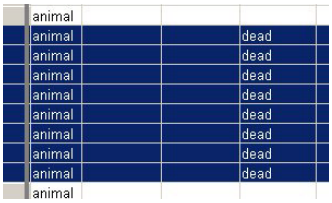
These fields show information for the currently selected protocol. Investigator displays the current investigator assigned to the protocol. This Animal Count shows the number of animals that have been “used” by the protocol over the number of animals allowed when you created the protocol.



Tip: To set “used” type, first click on Set Options in the Options menu on the menu toolbar. Select the Group Mgr. tab, then choose an item from the Used Type list.



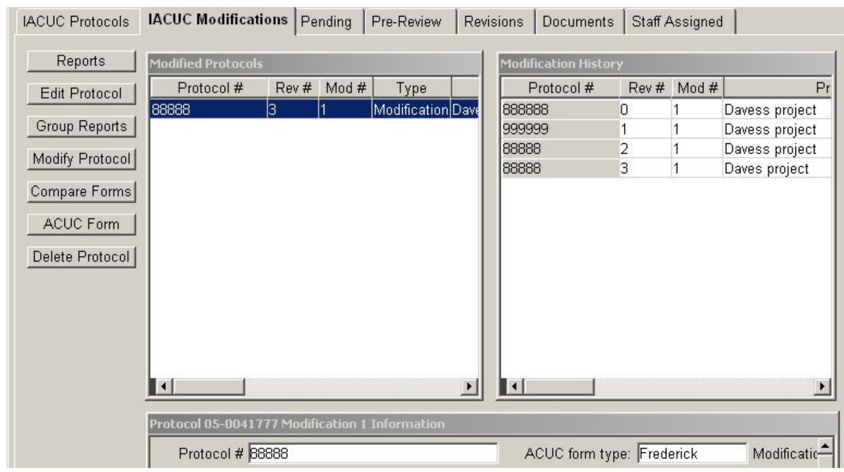




(To set used type, click on the Options item in the menu toolbarselect the Group Mgr. tab in the Set Options display of the Options menu item. Any animal that is used in groups associated with the prototype will be recorded. For example, if you chose "Sacrificed," any animals sacrificed in the protocol groups would add to This Animal Count.) This + Mod Count shows the number of animals used over the number of animals allowed for the selected protocol and its modifications. Animal Use calculates what percentage of the allowed number of animals have been used already. These amounts will turn red if too many animals have been used by the protocol. Days to Expire shows the number of days to protocol expiration, or "Expired" if the protocol is no longer current. See Section 1.2 for information on sacrificing, using and censoring animals.

Tip: Use "Renew Protocol" to revive an expired protocol.

4.2 IACUC Modifications

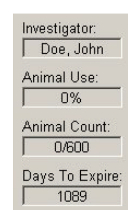


This tab-page shows any modifications for the protocol currently selected on the IACUC Protocols tab-page. To create a modification for a protocol, press Modify Protocol on the IACUC Protocols' tab-page. Modifications go through the same process of approval as original protocols, but they end up on this tab-page. The modifications are listed on the left in the Modified Protocols window. On the right is a list of any revisions that have been made to the modifcations. The window at the bottom of the tab-page shows the form for the currently selected modification.

Reports. Edit Protocol, Delete Protocol

See Common Procedures.

Group Reports



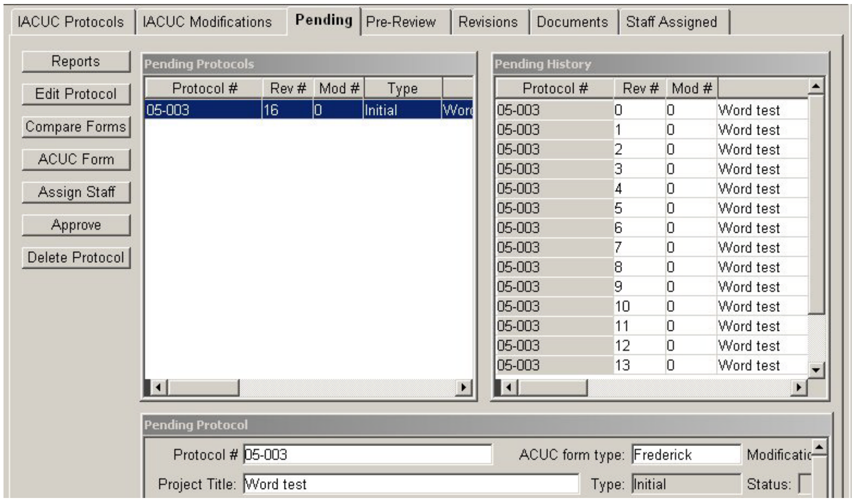
Press Group Reports to see a specialized report listing current protocols and all the groups that have been assigned to them from the Current Groups tab-page of the Group Manager. See Common Procedures for information on reports.

Modify Protocol, ACUC Form, Compare Forms

See section 4.1.

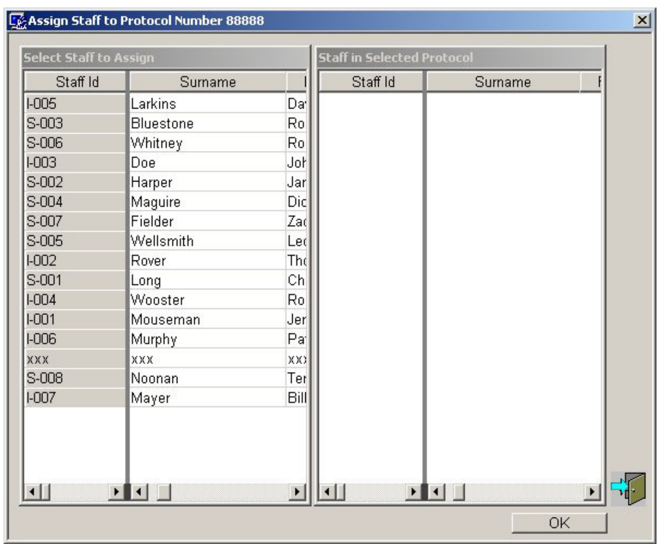
Investigator, Animal Use, Animal Count, Days to Expire

These fields show information for the currently selected protocol modification. Investigator displays the current investigator assigned to the protocol. Animal Use calculates what percentage of the allowed number of animals have been used already. Animal Count shows the number of animals that have been “used” by the protocol modification over the number of animals allowed. These amounts will turn red if too many animals have been used by the protocol Modification. Days to Expire shows the number of days to protocol expiration, or “Expired” if the protocol is no longer current. See section 4.1 for more information.



4.3 Pending

The Pending tab-page is where protocols or protocol modifications are sent once they have passed the Pre-Review tab-page. Edits made on this tab-page will appear in the Pending History window as revisions. The most current revision of the pending protocol or modification appears in the Pending Protocols window, and in the form at the bottom of the tab-page.



Reports, Edit Protocol, Delete Protocol

See Common Procedures.

Tip: Edits are saved as new revision levels.

Compare Forms

This function has not been implemented yet.

ACUC Form

See section 4.1.

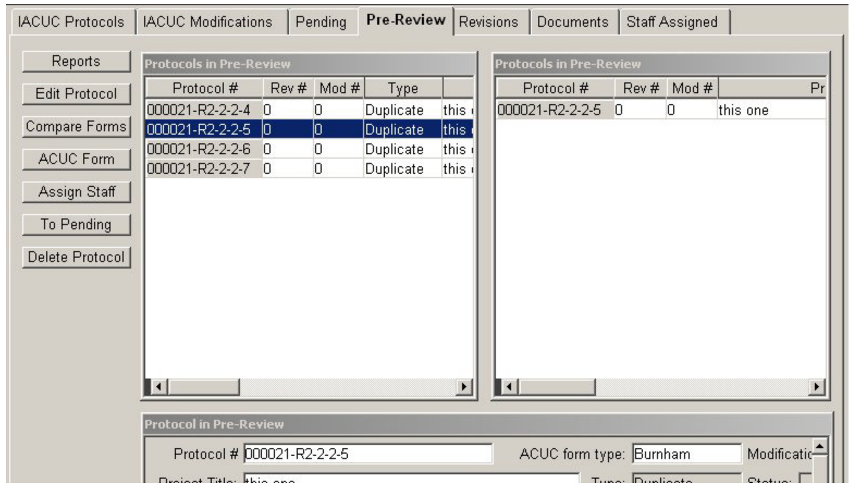
Assign Staff

Press this button to open a new staff assigning window. Staff members on this page consist of both PI staff and non-PI staff. Select one or more staff members on the left and drag them to the field on the right to assign them to the selected protocol. Drag staff members from the field on the right to the picutre of an arrow and a door in the lower right corner to unassign them. Press OK to save your staff assignment changes.

Approve

Press Approve when you are ready to accept the final version of the selected protocol or modification. Approved protocols will transfer to the IACUC Protocols tab-page; approved modifications will transfer to the IACUC Modifications tab-page. Any revisions created during the approval process will stay with the protocol or modification.

4.4 Pre-Review



The Pre-Review tab-page is where protocols or protocol modifications are sent once they have passed the Revisions tab-page. Edits made on this tab-page will appear in the window on the right as revisions. The most current revision of the pre-review protocol or modification appears in the Protocols in Pre-Review window, and in the form at the bottom of the tab-page.

Reports, Edit Protocol, Delete Protocol

See Common Procedures.

Tip: Edits are saved as new revision levels.

Compare Forms, ACUC Form

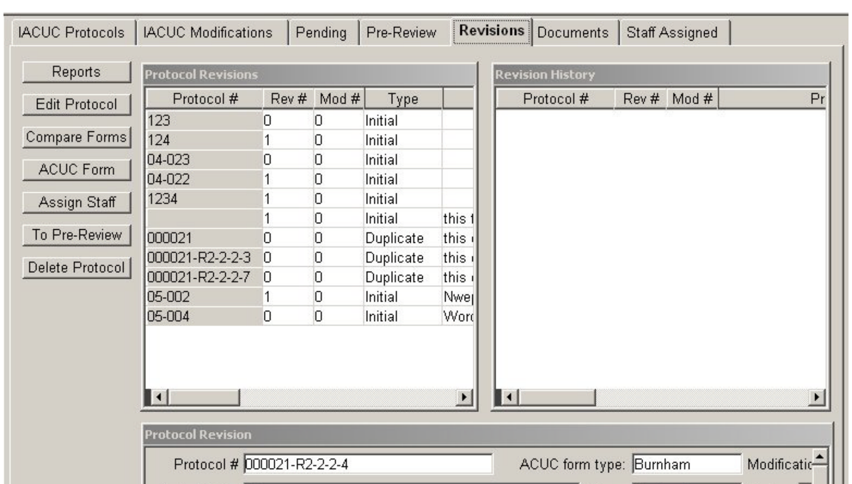
See Section 4.1

Assign Staff

See Section 4.3 for information on Assign Staff.

To Pending

Press To Pending when you are ready to move the selected protocol or modification to the Pending tab-page.



4.5 Revisions

The Revisions tab-page is where new, modified, duplicated and renewed protocols are sent from the IACUC Protocols tab-page. Edits made on this tab-page will appear in the window on the right as revisions. The most current revision of the protocol or modification appears in the Current Protocols window, and in the form at the bottom of the tab-page.

Reports, Edit Protocol, Delete Protocol

See Common Procedures.

Tip: Edits are saved as new revision levels.

Compare Forms, ACUC Form

See Section 4.1.

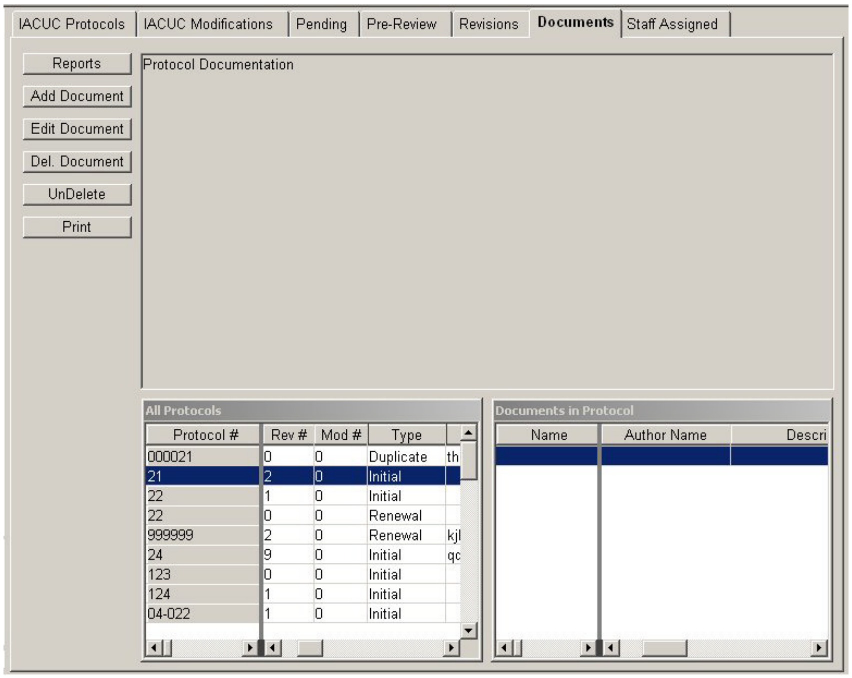
Assign Staff

See Section 4.3 for information on Assign Staff.

To Pre-Review

Press To Pre-Review when you are ready to move the selected protocol or modification to the Pre-Review tab-page.

4.6 Documents

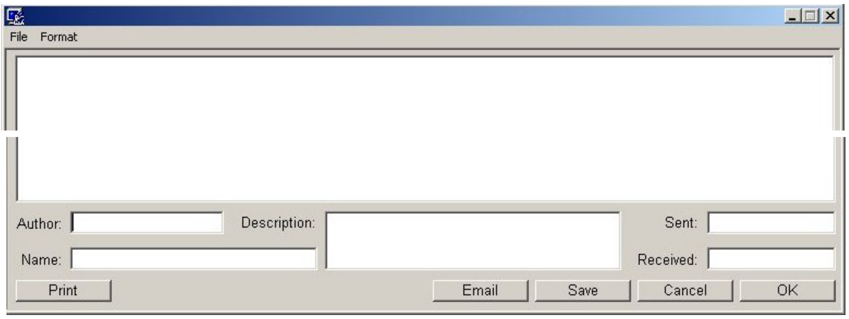


Select a protocol in the lower left corner, then create as many documents for the selected protocol as are necessary. To view the text for documents attached to a protocol, select the protocol and then select the desired document in the window in the lower right corner. The text will appear in the upper window.

Reports, Edit Document, Del. Document, UnDelete, Print

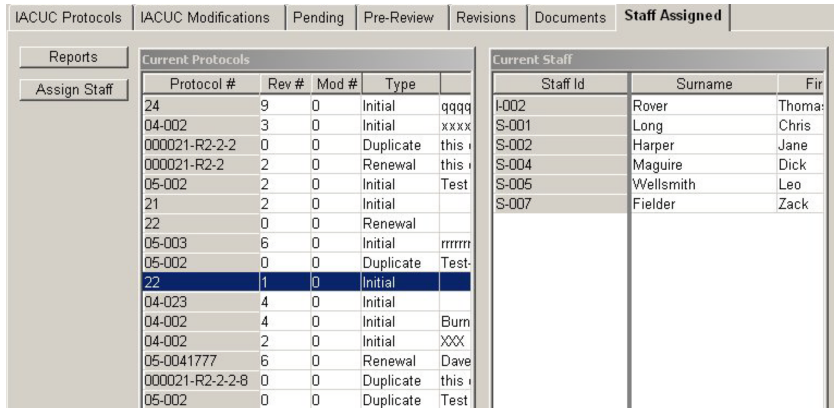
See Common Procedures.

Add Document



Press Add Document to open a new document form. Enter text into the large field in the top of the window manually, or copy-paste text from an outside source. Use the menu items above this field to edit text. Enter information into the provided fields, then press Save to preserve your changes. Press OK to create the new document. You can also print or email the text you entered.

4.7 Staff Assigned



Select a protocol in the window on the left to see staff members assigned to that protocol on the right. You can assign staff on the Pending, Pre-Review, Revisions, or Staff Assigned tab-pages.

Reports

See Common Procedures.

Assign Staff

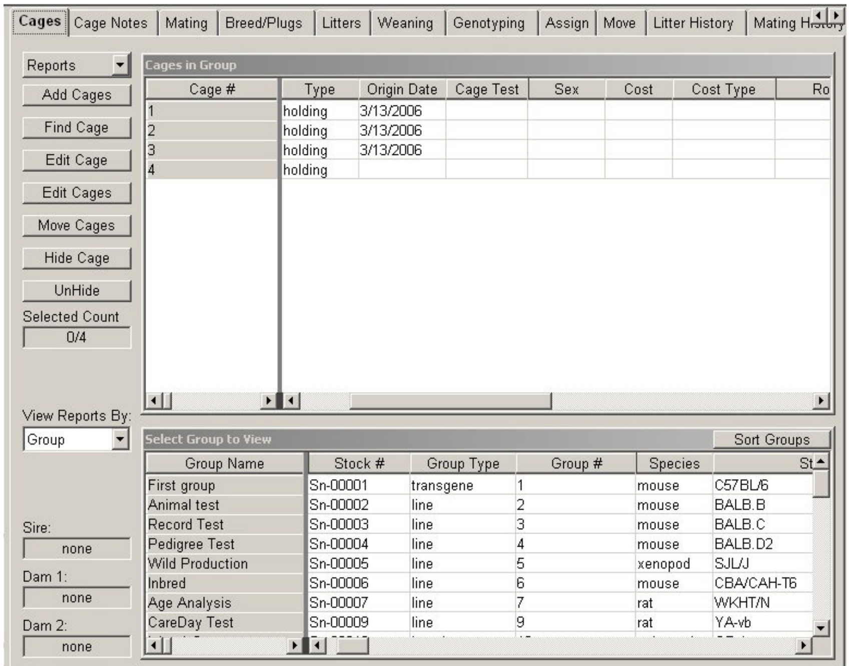
See section 4.3.

Notes

Notes

5. Cage Manager

5.1 Cages



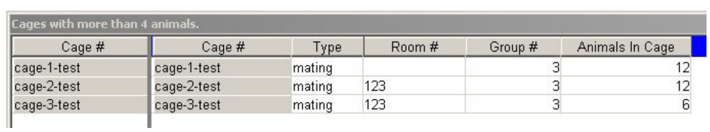
The Cage Manager keeps track of the physical cage locations of your animals. Select a group from the Select Group to View window at the bottom of this tab-page. The cages for the animals in this group will appear under Cages in Group. There are two ways to add cages to this function. You can press the Add Cages button, and enter a desired number of cages to be created. These cages will start out empty. You can also automatically create holding cages when you add animals in the Group Manager, or receive animals from an animal order or transfer. Note that if you want to put animals in the same cage, they should be in the same group. Cage numbers are automatically generated so there are no duplicate cages within a group; the autogenerated portion of the cage number is not editable.

Tip: There are two types of cages available here, holding and mating. Mating cages can have animals assigned to them from the Mating tab-page. Use Move or Assign to put animals in holding cages.

Reports

Reports - See Common Procedures.

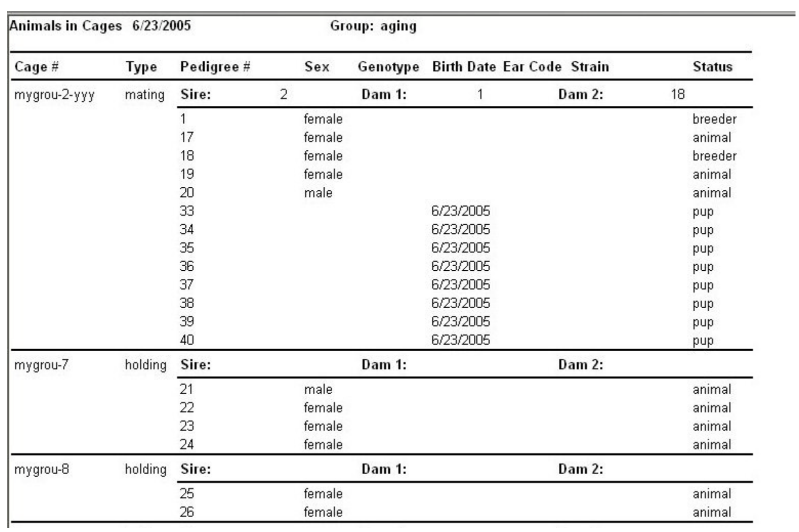
Overcrowding - If you have set an Allowed Animals per Cage number under Options in the menu bar, the Overcrowding report will tell you how many cages have exceeded this number. For example, if I set Allowed Animals per Cage to "four," this report shows I have two cages with more than four animals.



Cages with more than 4 animals.

Cage #	Cage #	Type	Room #	Group #	Animals In Cage
cage-1-test	cage-1-test	mating		3	12
cage-2-test	cage-2-test	mating	123	3	12
cage-3-test	cage-3-test	mating	123	3	6

Cage Animals - The Cage Animals report will show you all the cages for the group selected on the Cages tab-page, along with all the animals that are currently in those cages.

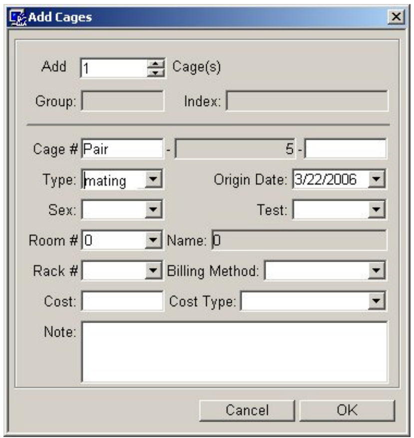


Animals in Cages 6/23/2005 Group: aging

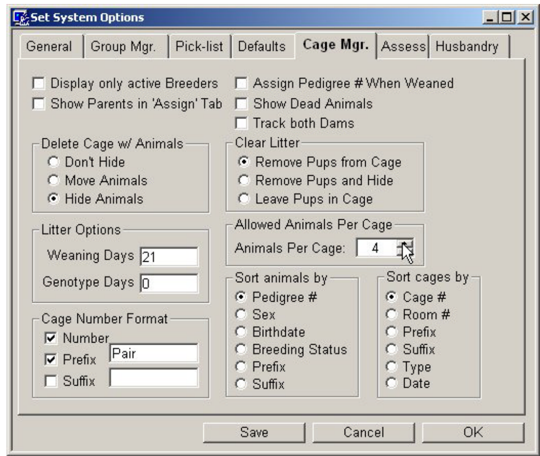
Cage #	Type	Pedigree #	Sex	Genotype	Birth Date	Ear Code	Strain	Status
mygrou-2-yyy	mating	Sire: 2		Dam 1: 1			Dam 2: 18	
		1	female					breeder
		17	female					animal
		18	female					breeder
		19	female					animal
		20	male					animal
		33			6/23/2005			pup
		34			6/23/2005			pup
		35			6/23/2005			pup
		36			6/23/2005			pup
		37			6/23/2005			pup
		38			6/23/2005			pup
		39			6/23/2005			pup
		40			6/23/2005			pup
mygrou-7	holding	Sire:		Dam 1:			Dam 2:	
		21	male					animal
		22	female					animal
		23	female					animal
		24	female					animal
mygrou-8	holding	Sire:		Dam 1:			Dam 2:	
		25	female					animal
		26	female					animal

Empty Cages - Click on the Empty Cages report button to see a list of all empty cages belonging to the currently selected group.

Add Cages



Press the Add Cages button to add one or more cages to the currently selected group. You can select either "holding" or "mating" for the cage type. Mating cages can hold one male and up to two females plus their litters before they are weaned (by default). You can set the allowed number of animals per holding cage under Options in the menu toolbar. You can also set a default prefix and/or suffix for cages here.



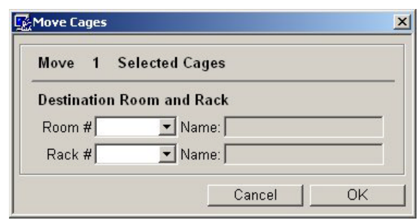
Tip: Setting the "Allowed Animals per Cage" does not limit the number of animals you can put in a cage. If the allowed animals number is exceeded, the cage will appear in the Overcrowding report.

Find Cage, Edit Cage, Edit Cages, Hide Cage, UnHide

See Common Procedures.

Move Cages

When you create or edit a cage, you have the choice to enter room and rack information. Room and rack information is provided by drop-down lists that you can customize in the Location Manager. Use the Move Cages function to edit the rack and room numbers for the selected cage(s). Note that rooms must belong to the facility in which the selected cages were created.



Selected Count

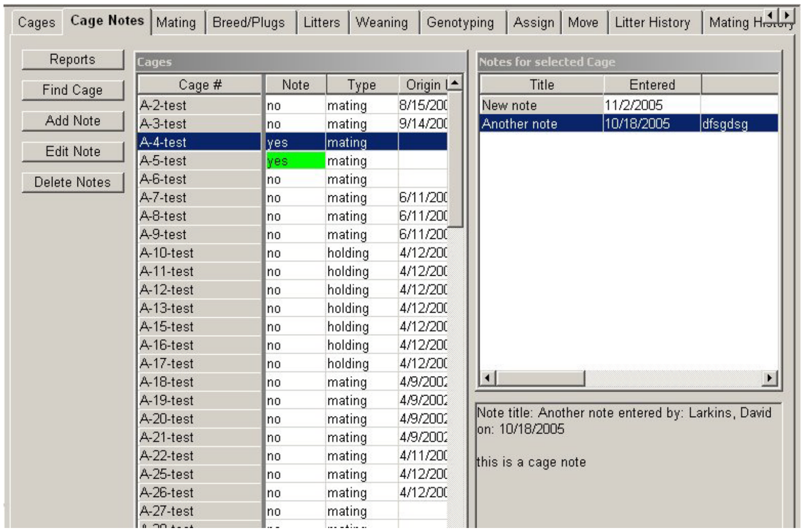
You have the option to select multiple cages in the Cages in Group window. The Selected Count window displays "number of cages selected"/ "number of cages not selected."

View Reports By

Choose "Group" to view Reports, Overcrowding, Cage Animals and Empty Cages reports for the currently selected group. Choose "All" to view the reports for all current cages in all groups.

Sire/Dam 1/Dam 2

If you select a mating cage, these displays will show any breeders currently living in the selected cage. If there is no breeder in a cage slot, that field will display "none." If there is a background animal in a cage slot, that field will appear blank.



5.2 Cage Notes

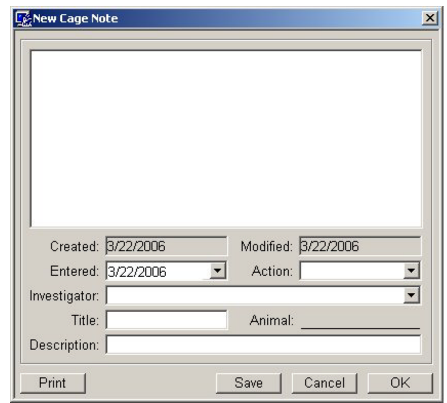
The Cage Notes tab-page allows you to enter text for the cage currently selected in the Cages window. New notes appear in the Notes for selected Cage window; select a note from this list to see note text displayed in the window in the lower right corner. You can enter multiple notes for each cage. A cage with one or more notes attached will show a “yes” in the Note column of the Cages display window; the Note field will appear in green so the user can see at a glance which cages currently have attached notes.

Find Cage, Edit Note

See Common Procedures.

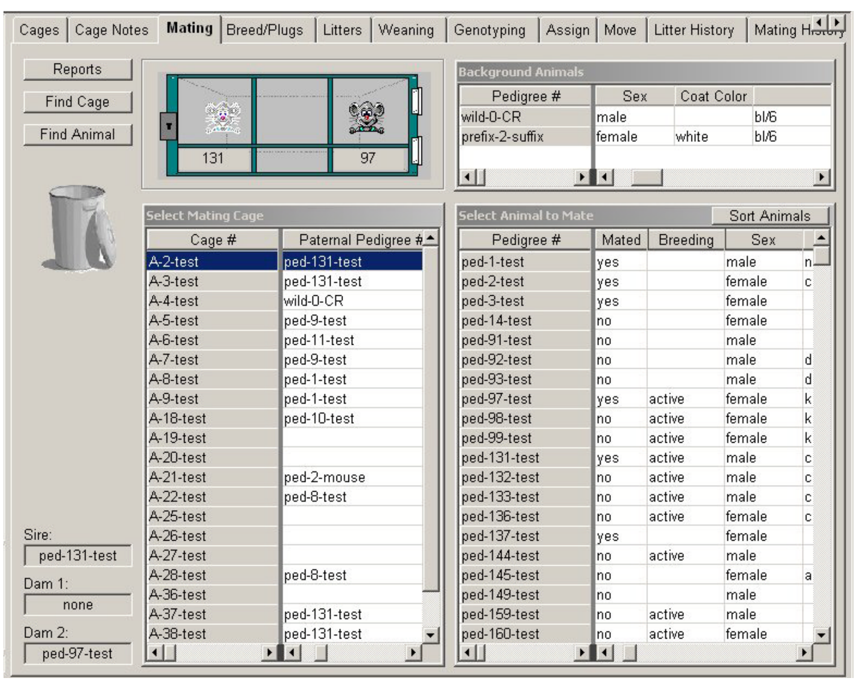
Add Note

Select a cage, then press Add Note to create a new note record. Type the note directly into the provided text box, or paste text from another location. Enter any other desired information, then save and press OK.



Delete Notes

Select a cage, then select one or more notes to permanently delete them from the database.



5.3 Mating

The Mating tab-page allows you to place animals from a selected group into mating cages belonging to that group. To mate animals in a cage, select the desired cage in the Select Mating Cage window. Drag and drop animals from either the Background Animals window or the Select Animal to Mate window to the picture of the mating cage in the upper left corner. You must place a male in the left-most slot. You can place a female in one or both of the two right slots. If you place a male in more than one cage, a ghost of the male will appear in all but the most recent cage. This allows sire pedigree information to be tracked when a male animal is physically mated in several cages. A female animal

cannot be placed in more than one cage; if you place a female in a new cage, its pedigree information will disappear from the old cage (pups previously created in the old cage will maintain any pedigree information). To remove an animal from the mating cage, drag it from the cage and drop it in the trash can to the left.

Tip: This tab-page represents one style of mating. Use the Transgene or Production Managers to perform different types of matings.

Reports, Find Cage

See Common Procedures.

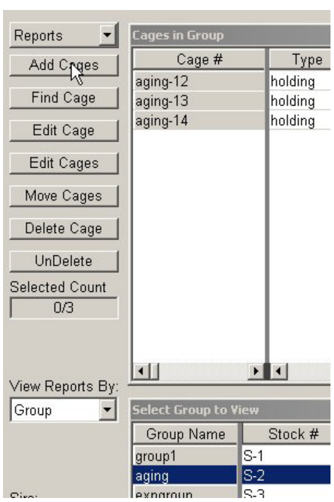
Sire/Dam 1/Dam 2

This display in the lower left corner shows any assigned sires or dams for the currently selected mating cage.

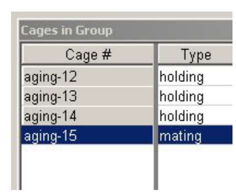
Sort Animals

In FACILITY version 6, you can now sort animals in the Select Animal to Mate window. See Common Procedures for more information.

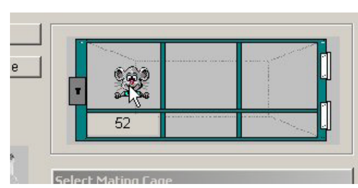
Tutorial: Creating a Mating Cage



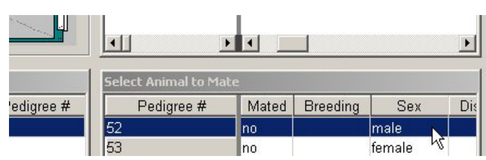
Assignment: As part of your aging study, you wish to mate some animals.



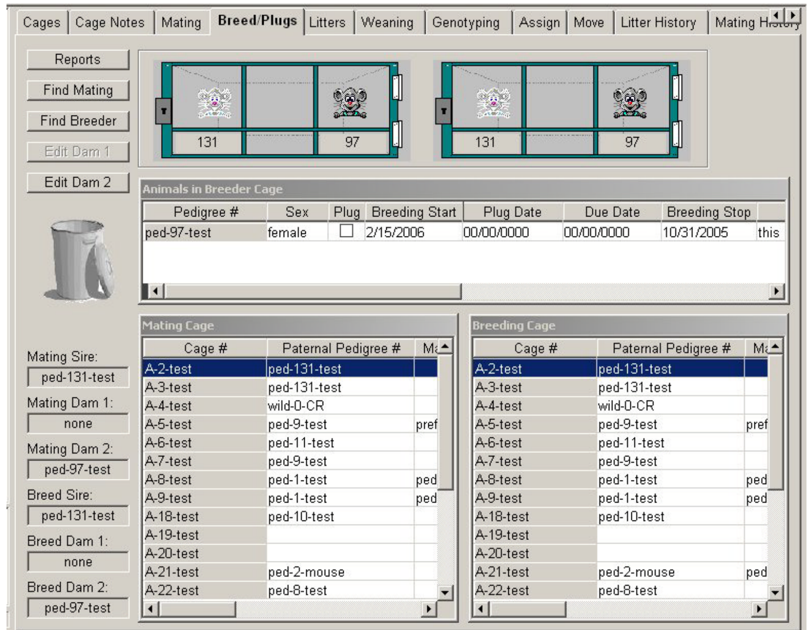
1. Go to the Cages tab-page of the Cage Manager.
2. Choose the group “aging” from the Select Group to View window.
3. Click Add Cages. Number of cages to add will be set to “1” by default. Set the cage type to “mating.”
4. Press OK to create one mating cage in the aging group.
5. Go to the Mating tab-page.
6. Choose the mating cage in the Select Mating Cage window.
7. Choose a male from the Select Animal to Mate window, and drag him to the left-most slot of the mating cage.



8. Drag and drop two females into the cage in the same manner.
9. The Sire and Dams will now appear in the lower left corner of the tab-page.
10. Go to the Cage Notes tab-page and enter pertinent cage information, if necessary.



5.4 Breed/Plugs



This tab-page, previously known as "Plugs/Dates," has changed significantly since FACILITY version 5. It now includes the added functionality of allowing the user to transfer pregnant females out of their original mating cages and into new mating cages for breeding purposes. Select a mating cage from the Mating Cage window in the lower left corner; cage information will appear in the upper left corner. Select a mating cage from the Breeding Cage window in the lower right corner; cage information will appear in the upper right corner. Note that the bottom windows display all mating cages that have been created on the Cages tab-page. Drag females from the mating cage to the breeding cage to change their cage location. Usually, no male record is present in the breeding cage; if a male record is present, you will be asked to remove that record before you enter the female record in the cage. When you place a female record into a breeding cage, a ghost of the sire will appear so that all line information will be preserved. If you wish to remove a female record from all mating cages, drag the record from one of the cages to the trash can on the left. To edit plug information for one of the dams in the selected breeder cage, press the "Edit Dam 1" or "Edit Dam 2" buttons, or double-click on the desired animal record in the "Animals in Breeder Cage" window.

Tip: Once you have moved an animal record to a "breeding" cage, you can't move it directly back. You must select the "breeding" cage in the "mating" window to further change the location of this animal record.

Reports, Find Mating, Find Breeder

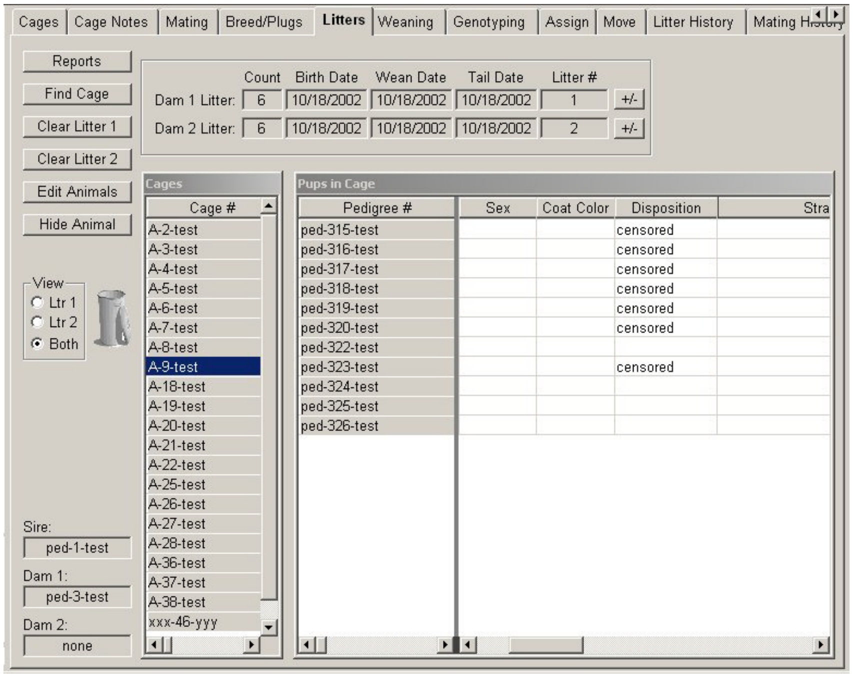
See Common Procedures.

Edit Dam 1, Edit Dam 2

Breeding Start Date in the Edit Maternal Plug window will be automatically entered, based on when the dam was placed into the mating cage. Check the Plug box if there is a plug noted for the dam. Note that the Edit window displays the animal pedigree number in the lower left corner, in case you are unsure which animal you are currently working with.

Tip: You can also open Edit Maternal Plug windows by double-clicking on the dams.

5.5 Litters



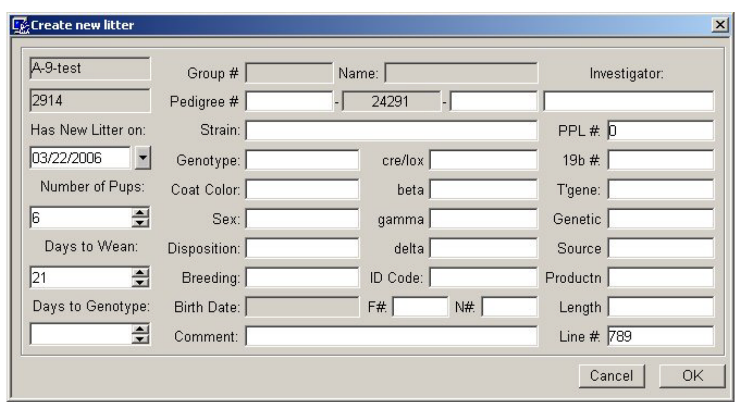
The Litters tab-page is where animals born to your facility start their existence in the program. Once you have mating cages containing dams you can start assigning litters to those dams. Litters start out in the mating cage, and are moved to holding cages when they are weaned. After you create a litter for a dam, the litter details will appear at the top of the tab-page. Use the +/- buttons to add or subtract animals from the litter count. Mating cages for the currently selected group appear in the left window; Pups in Cage appear on the right. The "Create Litter" buttons will change to "Clear Litter" buttons once litters have been entered. Because editing litters is such a common activity, entering information has been simplified on the Litters tab-page. Click in the Pups in Cage window to directly edit pup information manually or with drop-down lists.

Tip: Using the +/- buttons changes litter size, but hiding animals from a litter does not. Use +/- if you have entere litter size incorrectly; use the Hide button if a pup dies, to maintain original litter count accuracy.

Reports, Find Cage, Hide Animal

See Common Procedures.

Create/Clear Litter 1, Create/Clear Litter 2



Select a mating cage, then press the Create Litter 1 button to enter a litter for Dam 1 in that cage. A Create New Litter window will appear. Enter the number of pups in the litter on the left under the "Has New Litter on" date, which is set to the current date by default and will become the birthdate for these pups. You can edit pup information in this window, but note that any information you enter here will be applied to each new pup created.. Once created, pups can be edited individually by double-clicking in the Pups in Cage window. This button becomes "Clear Litter" if the breeder cage already contains a litter for this dam. Press Clear Litter to remove all current pups and litter information.

Tip: Set Clear Litter options on the Cage Mgr. tab-page of the Options menu on the menu toolbar. You can choose to remove pups from cage, remove pups and hide, or leave pups in cage when a litter is deleted. By default, pups are removed from the mating cage but not hidden.

Edit Animals

You can edit pup information directly from the Pups in Cage window. Another method for editing pup information is to select one or more pups, then press Edit Animals. This will open a new window that allows spreadsheet-style dragging data editing and entry.

View

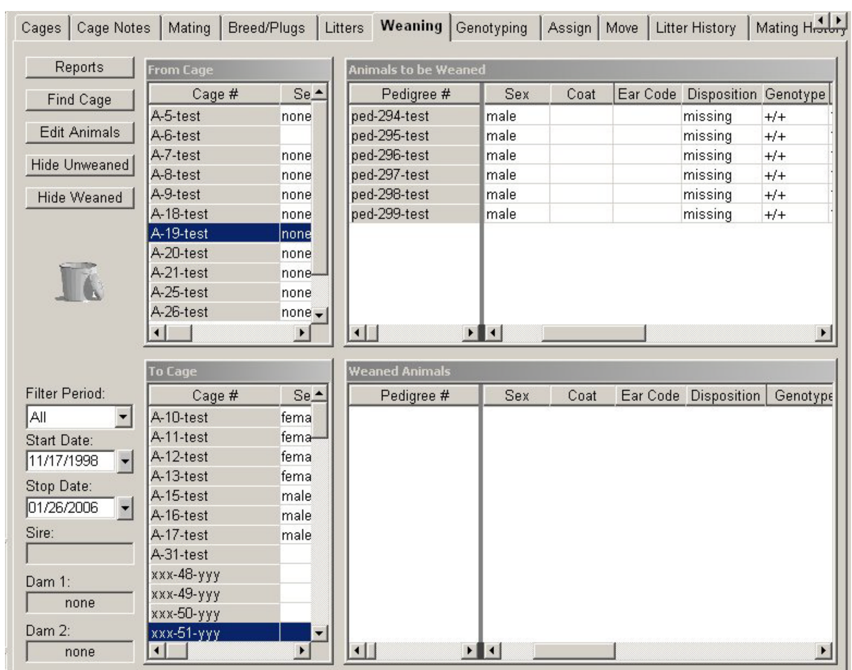
The View display allows you to toggle between seeing the litter for dam 1, dam 2, or both litters in the selected mating cage.

Sire/Dam 1/Dam 2

This display in the lower left corner shows any assigned sires or dams for the currently selected mating cage.

5.6 Weaning

When you create a litter, you have the choice to edit "Days to Weaning" on the left side of the Create New Litter window. The days will be automatically added to the litter creation date to give you a date for weaning your animals. The Weaning tab-page has a window showing mating cages in the selected group in the upper left corner, a list of pups in the selected mating cage in the upper right corner, a list of holding cages in the selected group in the lower left corner, and a list of weaned animals in the selected holding cage in the lower right corner. Wean animals from the selected mating cage to the selected holding cage by dragging them from the Animals to be Weaned window to the Weaned Animals window. Once you have weaned pups to holding cages you can use their old mating cage for another mating. You can also drag one or more animals into the trash can on the left side of the screen; this will remove them from their current cages, but they will not be hidden from view and can later be placed in new cages on the Assign tab-page.



Tip: Once you wean animals, you cannot return them to the mating cage.

Reports, Find Cage, Edit Animals

See Common Procedures.

Tip: Select one or more animals, then press Edit Animals to perform spreadsheet-style editing.

Hide Unweaned/Hide Weaned

Select a weaned animal in the Weaned Animals window, or an unweaned animal in the Animals to be Weaned window. Press the appropriate Hide button to hide the selected animal. Alternately, you can drag the selected animal to the trash can icon on the left.

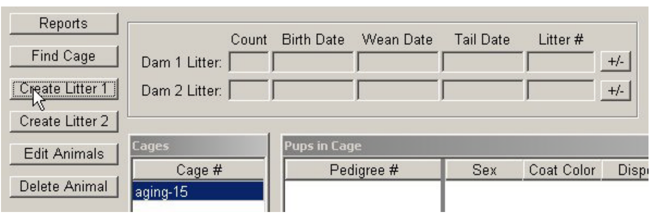
Filtering

See “Filtering by Time Period” in Common Procedures.

Sire/Dam 1/Dam 2

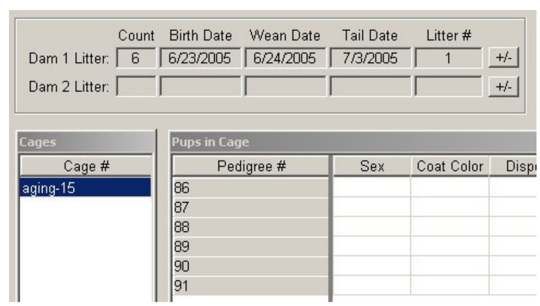
This display in the lower left corner shows any assigned sires or dams for the currently selected mating cage.

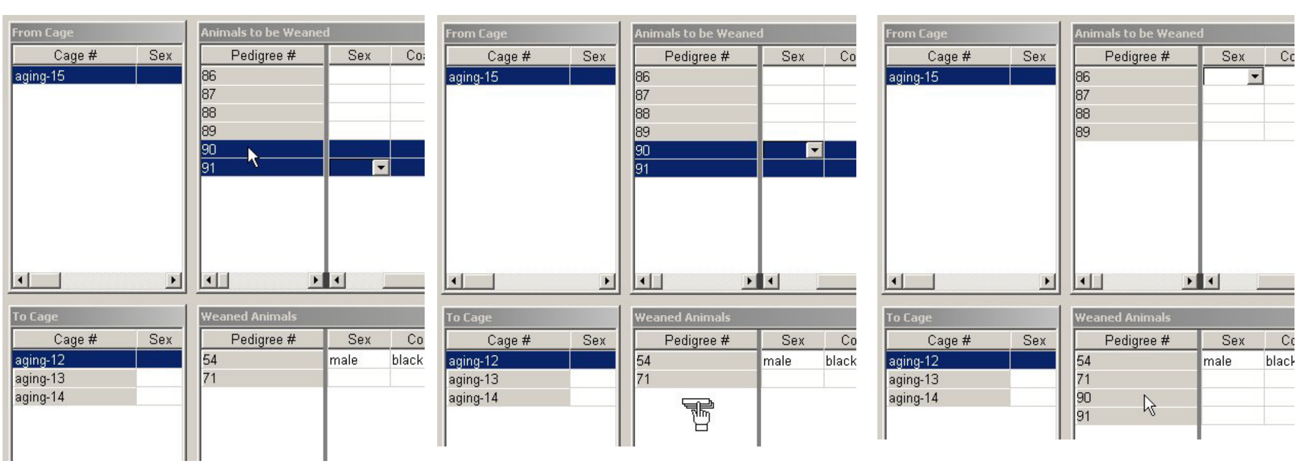
Tutorial: Creating a Litter and Weaning the Pups



Assignment: A dam in your aging study mating cage has had a litter of six pups. Record this litter and then wean the pups to holding cages.

1. In the Cage Manager, go to the Breed/Plugs tab-page if you want to move this dam to a new mating cage before the litter is born.
3. Click on the Litters tab-page, and select the desired mating cage.
4. Press the Create Litter 1 or Create Litter 2 button, depending on which position the dam is in.
5. Set the Number of Pups to six. For this exercise, set the Days to Wean to 1.
6. Press OK to create six pups in the mating cage.
7. Double-click on a pup to edit descriptive information.
8. Go to the Weaning tab-page, and select the desired mating cage.

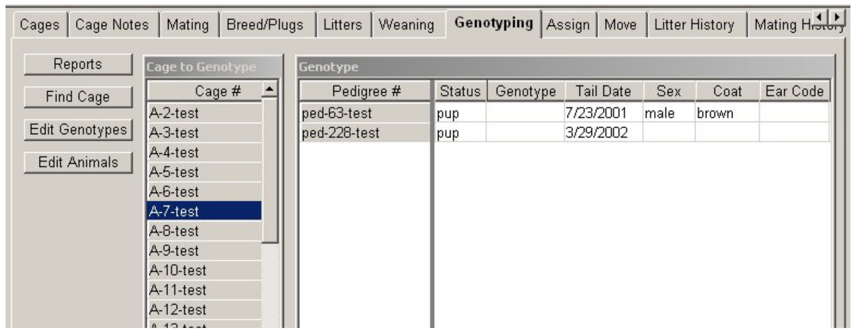




9. Note that if you set the Filter Period to Today, no pups appear, but if you set it to Tomorrow, the pups you just created show up.
10. Select a holding cage from the list in the bottom left corner. If no holding cages appear, create some on the Cages tab-page.
11. Drag pups from the top right window to the bottom right window.

Tip: It's possible to create a litter if no sire or dam is present; if you do, pedigree information will not be automatically generated (although you can enter maternal/paternal strain information manually.)

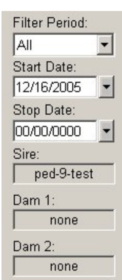
5.7 Genotyping



The Genotyping tab-page allows you to quickly enter information relating to genotyping (you can also access genotyping functions elsewhere in the program, such as when editing animals.) The list of cages under Cage to Genotype belongs to the group currently selected on the Cages tab-page. In the Genotype window appears a list of all animals currently belonging to the selected cage.

Reports, Find Cage, Edit Genotypes, Edit Animals

Select a cage, then press Edit Genotypes to edit genotype information for all animals in the selected cages. Select one or more animals in a cage then press Edit Animals to edit specific animal records. See Common Procedures for more information.



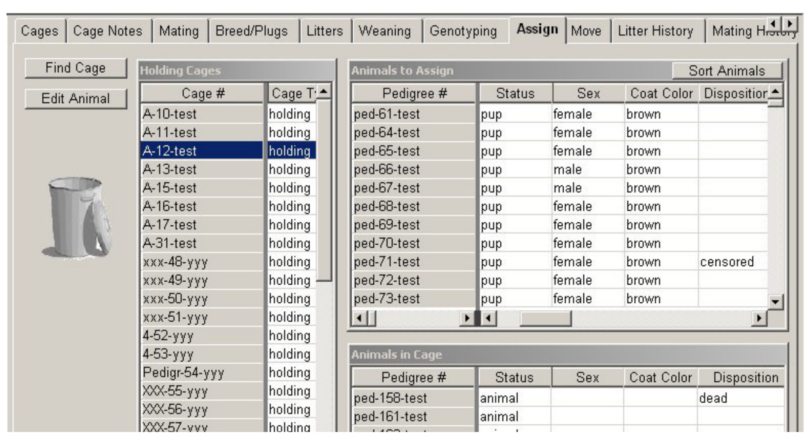
Filtering

See “Filtering by Time Period” in Common Procedures.

Sire/Dam 1/Dam 2

This display in the lower left corner shows any assigned sires or dams for the currently selected mating cage.

5.8 Assign



The Assign tab-page allows you to view all currently cageless animals in the selected group and to assign them to cages. To assign animals to a cage, select a cage from the Holding Cages list on the left then drag the desired animals from the Animals to Assign window on the upper right to the Animals in Cage list on the lower right.

Find Cage, Edit Animal

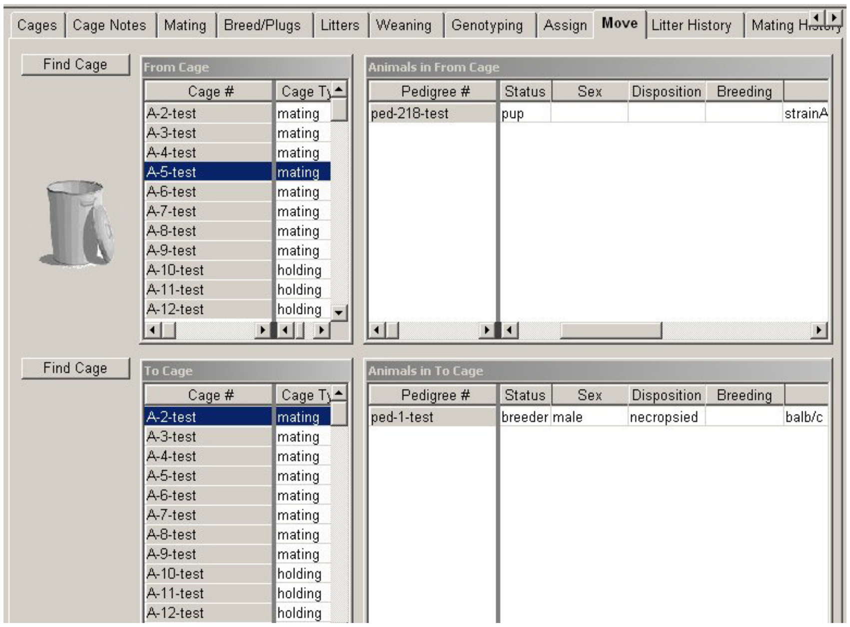
See Common Procedures.

Sort Animals

In FACILITY version 6, you can now sort animals in the Animals to Assign window. See Common Procedures for more information.

5.9 Move

Use the Move tab-page to change the cage location of animals in the selected group. Select a From Cage and a To Cage, then drag animals from the Animals in From Cage list to the Animals in To Cage list. Note that different cage styles don't have protections on them; for example, you will not be prevented from putting six animals into a mating cage, or from putting three adult males in a holding cage. This accomodates varying animal caging styles.



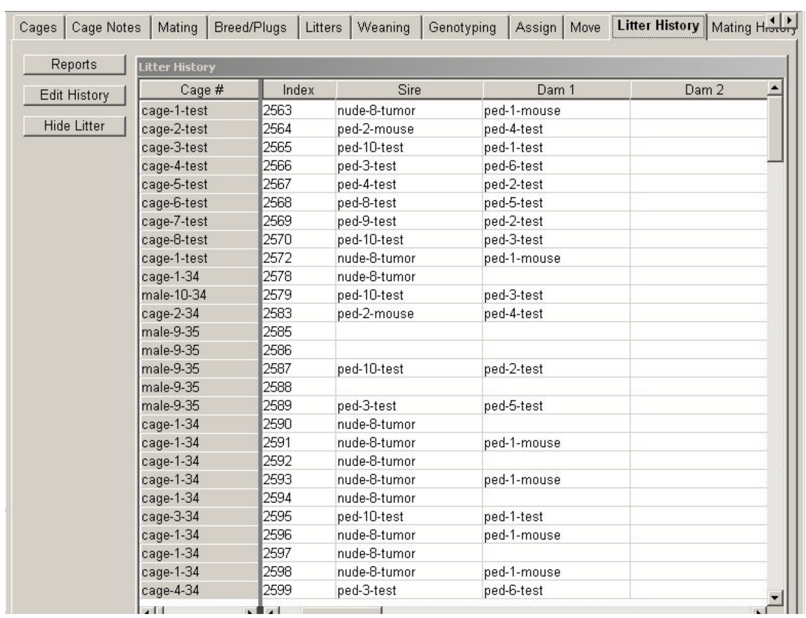
Tip: This tab-page only includes caged animals. Use the Assign tab-page to put uncaged animals in cages.

Find Cage

See Common Procedures.

5.10 Litter History

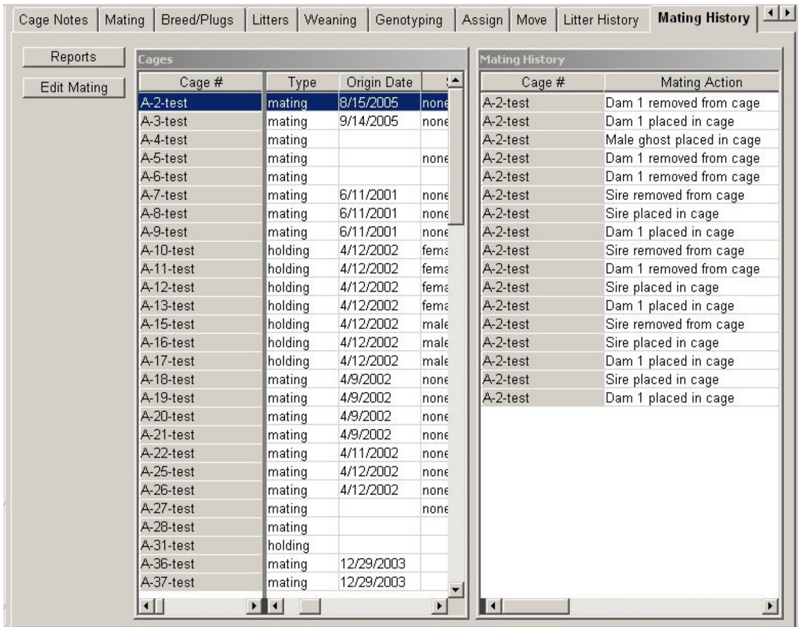
View litter history on the Litter History tab-page. This function allows you to see a variety of information about the litters that have been created to date. Litter births are organized by the cage number in which the birth occured. Litters are organized by litter index. Litter index numbers are generated automatically, and are chronological based on the date on which the birth occured.



Reports, Edit History, Hide Litter

See Common Procedures.

Tip: Edit History and Hide Litter are not meant for regular data entry; it often makes sense to disable them for all non-administrative users.



5.11 Mating History

View mating history on the Mting History tab-page. This function allows you to see a variety information about the matings that have been occured to date. Select a cage (either mating or holding) from the Cages window to see a list of events for that cage in the Mating History window. You can keep track of when a dam was placed in or removed from the selected cage, when a sire was placed in or removed from a cage, when a background male or female was placed in or removed from a cage, and when a male ghost was placed in or removed from a cage.

Reports, Edit Mating

See Common Procedures.

Tip: Edit Mating is not meant for regular data entry; it often makes sense to disable this for all non-adminstrative users.

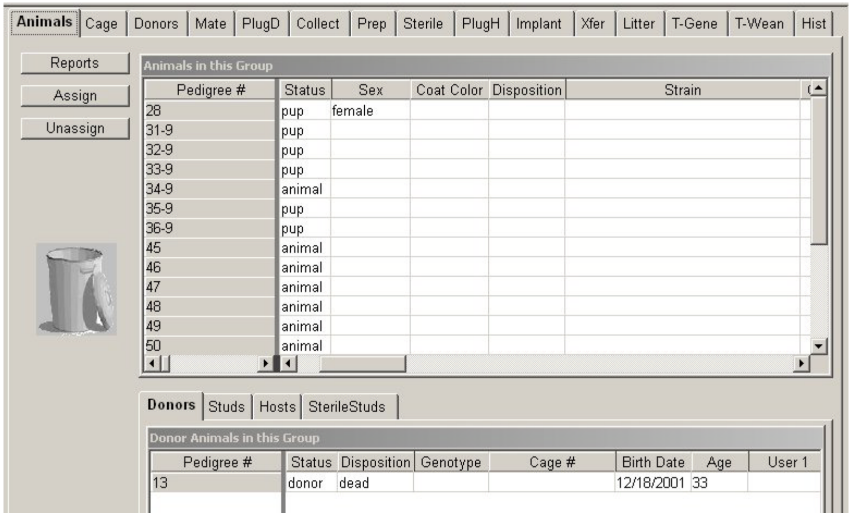
Notes

Notes

6. Transgene Manager

6.1 Animals

The Animals tab-page shows a list of all animals in the group currently selected in the Group Manager. On this tab-page, you can turn animals into Donors, Studs, Hosts, or SterileStuds. Select one or more animal(s) from the Animals in this Group list, and then choose the desired destination tab from the ones in the lower window. Drag and drop the animal(s) into the lower window to set their new function. Animals assigned in this manner will receive a new status of "donor," "stud," "implant" (same as host), or "sterile" (same as sterilestud).



Tip: The Cage, Transgene, and Production Managers use different methods to keep track of animals. It's a good idea to have one style of mating per group, and to use that manager to take care of all the group's caging and mating needs.

Reports

See Common Procedures.

Assign

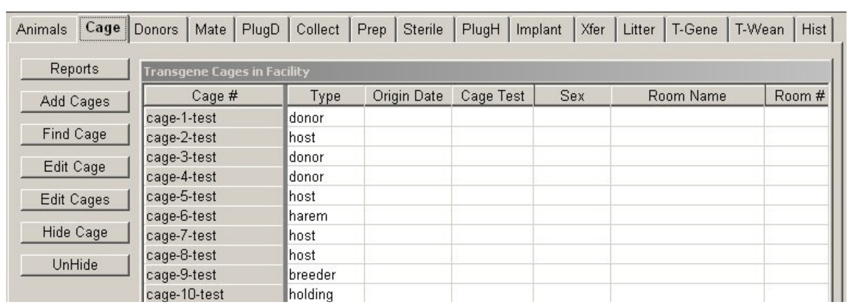
This button is not currently functional. Use drag and drop manipulations to assign animals.

Tip: Once you assign an animal as donor, stud, host, or sterile stud, it no longer appears in the Animals in Group list.

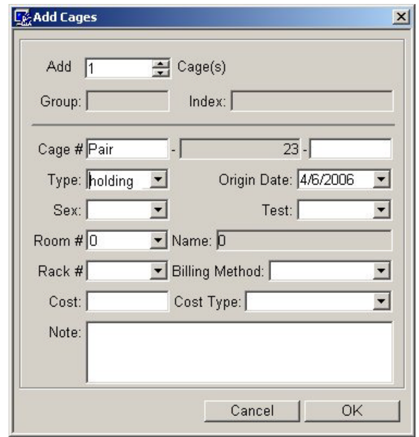
Unassign

Select one or more animals in the lower window, then press the Unassign button to return these animals to their regular animal status.

6.2 Cage



Use the Cage tab-page to create holding, host, breeder, and donor cages for your animal groups involved in transgene mating. Holding cages are used to hold animals not currently involved in mating; they can be created here, or when you add animals in the Group Manager. Donor cages are used on the Mate tab-page to set up matings between donor animals and stud animals. Host cages are used on the Sterile tab-page to house hosts and sterile studs for the implantation process. After this, you can transfer the hosts into breeder cages, in which you can record litters resulting from the transgene mating. Cages created on this tab-page will appear in the Cage Manager, and vice versa, but it's better not to mix mating styles within a group.



Reports, Find Cage, Edit Cage, Edit Cages, Hide Cage, and UnHide

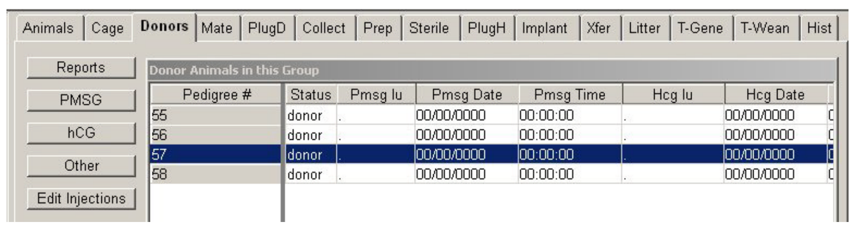
See Common Procedures.

Add Cages

Press the Add Cages button to add one or more cages to the currently selected group. You can select “holding,” “host,” “donor,” or “breeder” for the cage type. Donor cages are for creating embryos you can later collect and can hold donors and studs. Host cages are for holding hosts implanted with embryos and sterile studs. Breeder cages are for keeping track of hosts that have become pregnant. You can set the maximum number of animals per holding cage under Options in the menu toolbar. The Cage # is formed from part of the selected group name and the next number in that sequence of cages.

6.3 Donors

The Donors tab-page allows you to take care of administering injections to donor animals in preparation of transgene mating. Select an animal in the Donor Animals in this Group window, then press on one of the injection type buttons to edit information for that injection. you can also view the information for all three types at the same time by pressing Edit Injections.

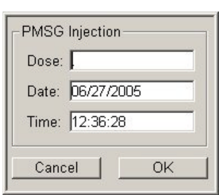


Reports

See Common Procedures.

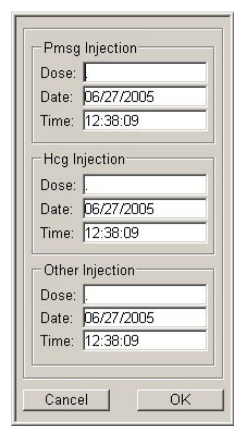
PMSG/hCG/Other

Enter Dose, Date, and Time for PMSG, hCG, or Other injections, one at a time.



Edit Injections

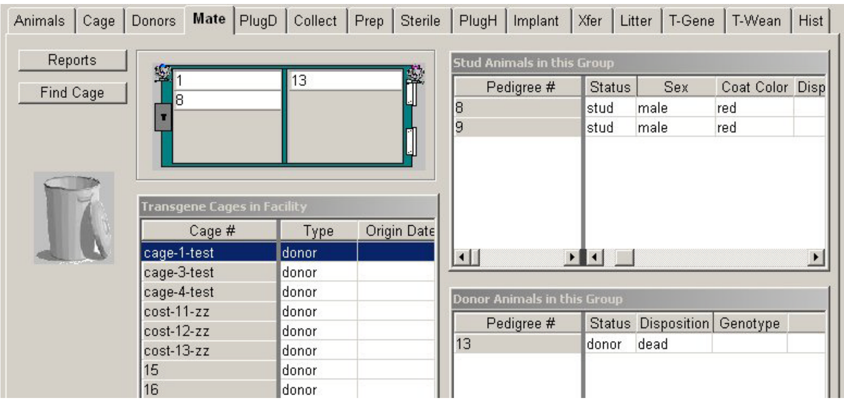
Edit the information for PMSG, hCG, and Other injections all in one place. Press this button to open a window that displays the information for each injection.



6.4 Mate

Use the Mate tab-page to place animals in donor cages created on the Cage tab-page. Select a donor cage from the Transgene Cages in Facility list. Drag stud animals from the top-right window to the left side of the cage picture (marked by a mouse with a blue hat). Drag donor animals from the bottom-right window to the right side of the cage picture (marked by a mouse with a pink bow). You can assign as many as you like of each type to the cage from the lists.

Tip: This is only one style of mating. Use the Cage or Production Managers to perform different



types of matings.

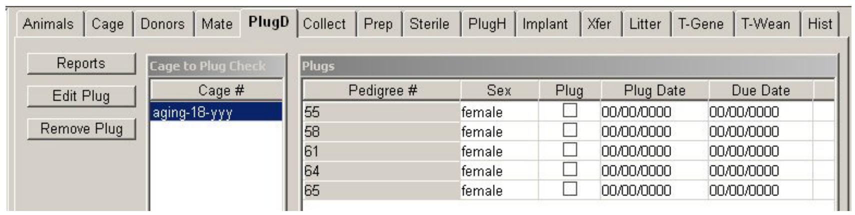
Reports, Find Cage

See Common Procedures.

Tip: Unlike in the Cage Manager, the status of an animal does not change once it is put in a donor cage.

6.5 PlugD

From the PlugD tab-page you can edit or remove plugs for the animals assigned to your donor cages.



Reports

See Common Procedures.

Edit Plug

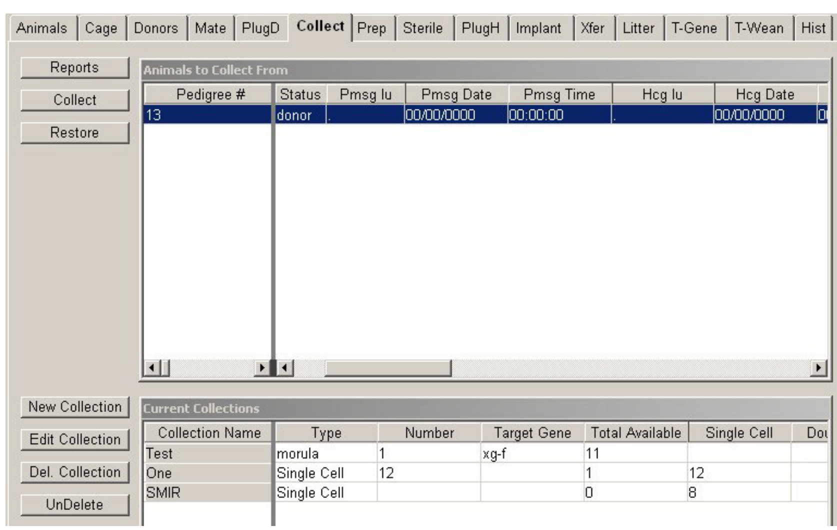
Select a cage to plug check and an animal from the list of Plugs, then press Edit Plug to open a new Edit Maternal Plug window. When you check the Plug checkbox, an X will appear in the box in the Plug field of the Plugs window.

Remove Plug

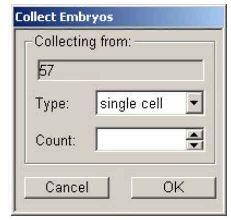
Select an animal from the Plugs list and press Remove Plug to get rid of all plug information. Note that you will not be able to retrieve this plug information; therefore, you will be asked to verify your request.

6.6 Collect

Select a collection from the Current Collections window to start the collection process. Then select from the top window an animal to collect from. You can make collections of type single cell, double cell, morula, or blastocyst. Use the Restore button to return animals that have been collected from to the active page.



Reports, Edit Collection, Del. Collection, UnDelete



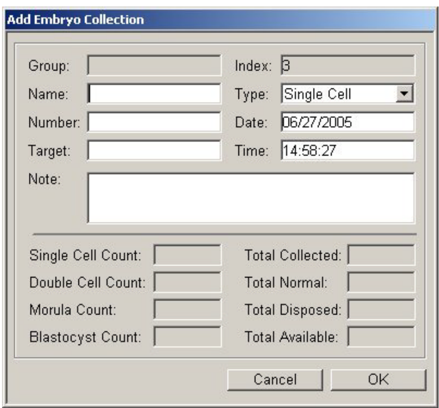
See Common Procedures.

Tip: You can directly edit the number of cells collected; these amounts are also automatically updated.

Collect

Select a collection and an animal and press collect to open an new Collect Embryos window. Enter the Type and Count for the collection, then press OK to save your changes.

Tip: The type retrieved from an animal must match the collection's type.



Restore

See Hide/UnHide in Common Procedures.

New Collection

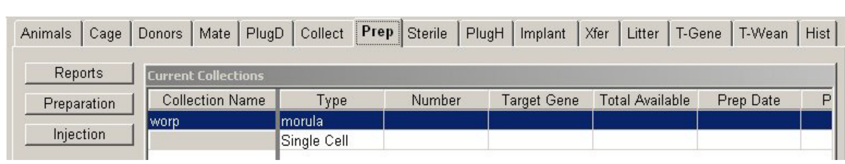
You must add a new collection before you can collect embryo cells from animals. Note that collections belong to the group for which they are created; you cannot access collections from one group while you are editing collections for another group. When you add an embryo collection, you cannot edit information in the bottom half of the window. This information is updated automatically when you make collections of the stated types. Press OK to save your information when you are ready to create the collection.

Tip: Once you set the collection type (for example, to single cell) you can only take collections of that type. You can, however, change the collection type using Edit Collection, and then make collections of the new type.

6.7 Prep

Embryos enter the preparation stage after they have been collected and before they have been implanted into host animals. This tab-page allows you to keep track of any notes on preparation for the selected collection. You must prepare a collection before it becomes available; the count of "available" items cannot be exceeded during implantation. On the Prep tab-page, you can view the collections for the currently selected group, entered from the Collect tab-page. Select the collection from this window for which you would like to edit injections or preparations.

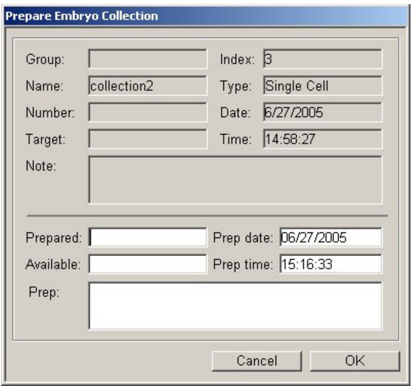
Reports



See Common Procedures.

Preparation, Injection

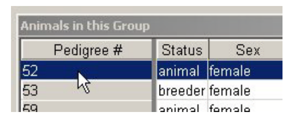
Enter numbers for Prepared and Available, and text for Prep. "Available" is the number of items you will be able to implant on the Implant tab-page. Press Injection to record injection information.



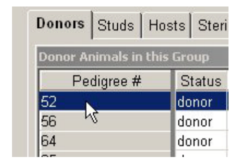
Tip: Collected embryos ("count" on the Collect tab-page) and "available" embryos are kept track of separately. "Count" is a static number that records amount collected; "available" is discounted depending on how many implantations you make, and limits implantation amount.

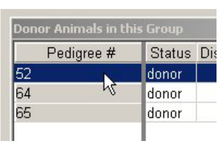
Tutorial: Donors, Mating, and Collection

Assignment: You wish to make some collections from donor animals for an experiment.

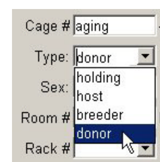


1. In the Group Manager, create a group called "transg1."
2. Go to the Animals tab-page of the Transgene Manager.
3. Select the Donors tab at the bottom of this tab-page.
4. Choose a female animal from the Animals in this Group window, and drag it to the Donor Animals in this Group window.

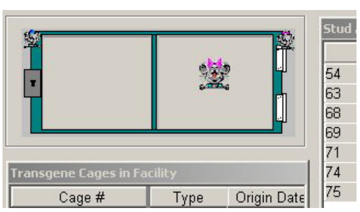


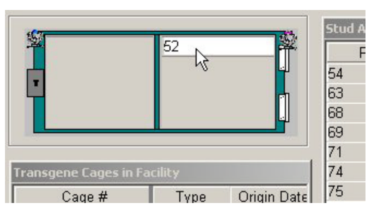


5. Select the Studs tab-page.
6. Choose a male animal from the Animals in this Group window, and drag it to the Studs Animals in this Group window.
7. Go to the Cage tab-page, and press the Add Cages button.
8. Add one cage of type donor; press OK to create the cage.



9. Open the Mate tab-page.
10. Select your newly created donor cage.
11. Drag the donor to the right side of the cage; the animal will appear first as a mouse with a bow, and then as a number.
12. Repeat with the stud, to the left side of the cage.



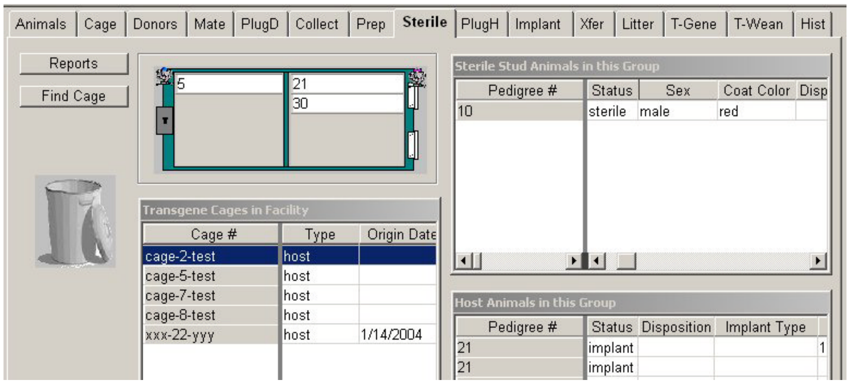


13. Go to the Collect tab-page.
14. Press the New Collection button, and enter information for a new collection of type Single Cell. Press OK to create the collection.
15. Select the desired embryo collection animal, and press the Collect button.
16. Enter the collection count, and press OK to take the collection.

Tip: Collection type defaults to single cell. You'll need to change this during collection if your collection type is different.

6.8 Sterile

The Sterile tab-page is just like the Mate tab-page, although it uses sterile studs and hosts as opposed to regular studs and donors. Sterile caging uses host cages, which can be created on the Cage tab-page of the Transgene Manager. Once you have created one or more host cages, and set animals as sterile studs and hosts, you can set up host/sterilestud matings. Select the desired cage from Transgene Cages in Facility. Drag and drop sterile studs from the window in the upper right corner to the left side of the cage. Drag and drop hosts from the lower right corner



to the right side of the cage.

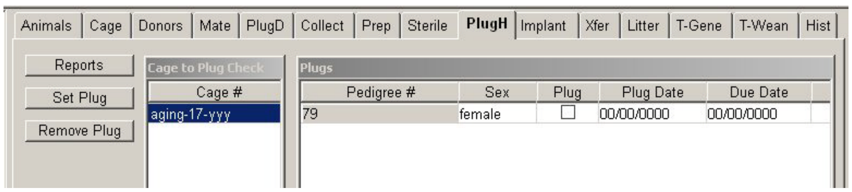
Tip: Unlike in the Cage Manager, the status of an animal does not change once it is put in a host cage.

Reports, Find Cage

See Common Procedures.

6.9 PlugH

PlugH is very similar to PlugD. The list in the Cage to Plug Check window is composed of host cages, which you can view on the Sterile tab-page, or either of the Cage/Cages tab-pages. From here you can set or remove host plugs.



Tip: Animals must be placed in host cages before they can have plugs set or be part of the implantation process.

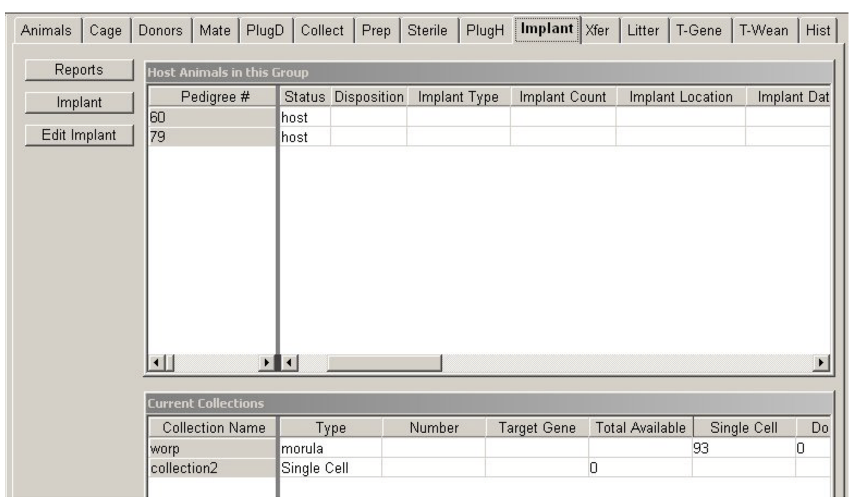
Reports

See Common Procedures.

Set Plug, Remove Plug

Press Set Plug to open a new Edit Maternal Plug window. Enter plug information, then press OK to create the new plug. Press Remove Plug to remove the selected plug.

6.10 Implant

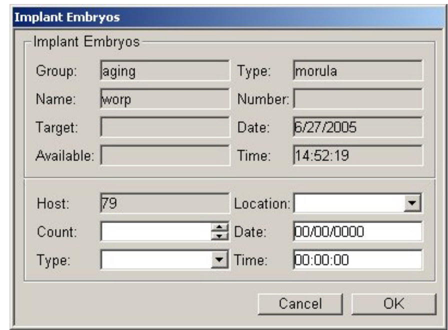


The Implant tab-page shows you a list of host animals in the currently selected group, and a list of current collections. Collections can be added and edited from the Collect tab-page. Select the desired host and collection, and then press the Implant button to record an implant.

Reports, Edit Implant

See Common Procedures.

Implant



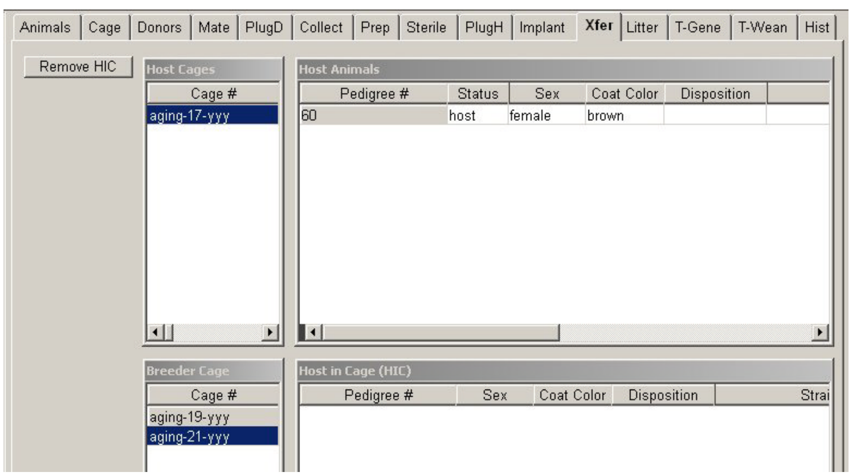
Press this button to record an implant for the selected host and collection. Enter implant information, and press OK to save the implant.

Tip: Implant count cannot exceed the "Total Available" for a collection. When you perform an implant, "Total Available" will decrease by the recorded implant count.

6.11 Xfer

Use the Xfer tab-page to move hosts from their host cages to breeder cages created on the Cage tab-page. Select a cage from the Host Cages list and one from the Breeder Cages list. Drag animals from the Host Animals window to the Host in Cage (HIC) window. You can only have one breeder per breeder cage.

Remove HIC

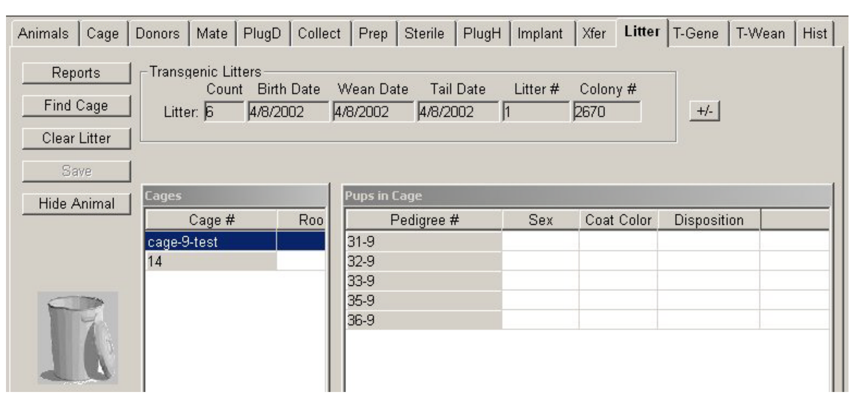


Select an animal in the Host in Cage window, and press Remove HIC to remove the animal from view.

Tip: An animal that has been moved to a breeding cage will no longer appear anywhere on the Animals tab-page; a HIC that has been removed will not appear on the Animals or the Xfer tab-page.

6.12 Litter

From the Litter tab-page you can create litters for hosts that have been transferred to breeder cages on the Xfer tab-page. Select the desired cage from the Cages List. View litter animals in the Pups in Cage window, and get a quick overview of litter information by looking under Transgenic Litters at the top of this tab-page. Use the +/- button beside the transgenic litter information to easily increase or decrease the number of pups in a litter. You can edit pup information directly from the Pups in Cage window by clicking in any field and typing or utilizing the provided drop-down lists. Because editing litters is such a common activity, entering information has been simplified on the Litter tab-page. Click in the Pups in Cage window to directly edit pup information manually or with drop-down lists.



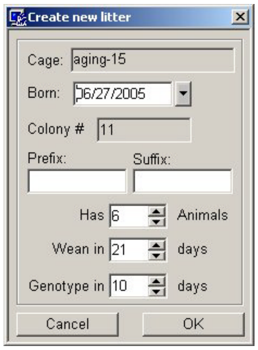
Tip: Using the +/- buttons changes litter size, but deleting animals from a litter does not. Use +/- if you have entere litter size incorrectly.

Reports, Find Cage, Save, Hide Animal

See Common Procedures.

Create/Clear Litter

This button appears as “Create Litter” if there is not currently a litter in the selected breeder cage. Press Create Litter to enter information for a new litter, then press OK to save changes. The button becomes “Clear Litter” if the breeder cage already contains a litter. Press Clear Litter to remove all current pups and litter information.

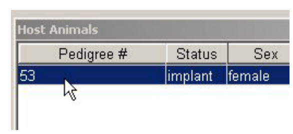


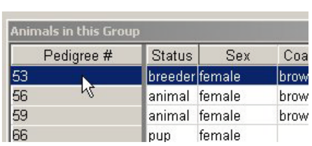
Tip: Set Clear Litter options on the Cage Mgr. tab-page of the Options menu on the menu toolbar. You can choose to remove pups from cage, remove pups and hide, or leave pups in cage when a litter is cleared. By default, pups are removed from the mating cage but not hidden.

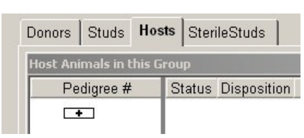
Tutorial: Hosts, Xfer, and Litters

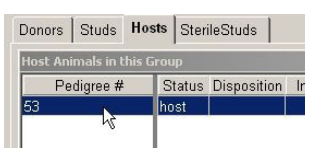
Assignment: Use the collections in your transg1 group to create new litters.

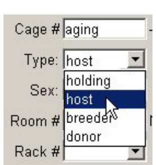
1. In the Group Manager, select the group transg1.
2. Go to the Animals tab-page of the Transgene Manager.
3. Select the Hosts tab at the bottom of this tab-page.
4. Choose a female animal from the Animals in this Group window, and drag it to the Host Animals in this Group window.
5. Select the SterileStuds tab-page.
6. Choose a male animal from the Animals in this Group window, and drag it to the SterileStuds Animals in this Group window.
7. Go to the Cage tab-page, and press the Add Cages button.
8. Add one cage of type host; press OK to create the cage.
9. Open the Sterile tab-page.
10. Select your newly created host cage.
11. Drag the host to the right side of the cage; the animal will appear first as a mouse, and then as a number.
12. Repeat with the sterile stud, to the left side of the cage.
13. Go to the PlugH tab-page, and select the host cage containing your host and sterilestud.’
14. Press Set Plug and enter the necessary information, then press OK to set the plug.
15. Go to the Implant tab-page. Select an embryo collection and a host animal, then press Implant to choose a number of implants.
16. Press OK and move to the Xfer tab-page.
17. To transfer hosts to breeder cages, choose a host cage and a breeder cage, and

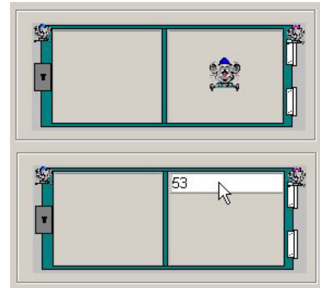








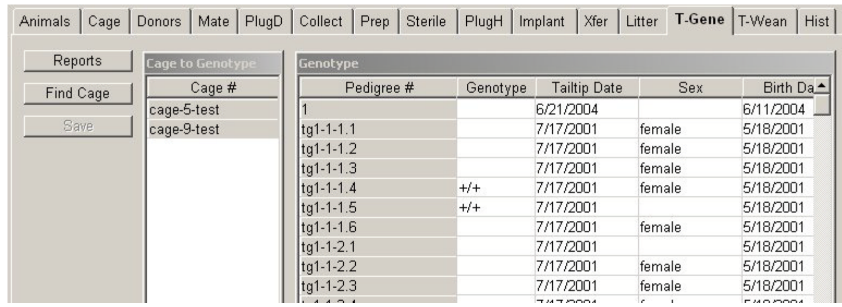




drag animals from the Host Animals window to the Host in Cage window.
18. Go to the Litter tab-page and select the desired breeder cage.
19. Use the Create Litter button to create a new litter in the selected breeder cage.

6.13 T-Gene

The T-Gene, or transgene tab-page allows you to set genotype information for the selected breeder cage. Select a cage to genotype from the list of breeding cages in the current group. To edit genotype information, click in the desired information field and type or use the provided drop-down lists.



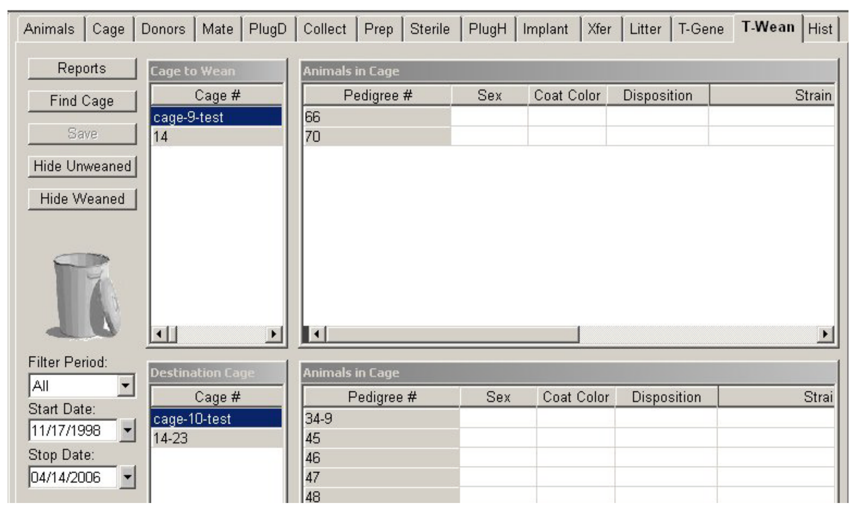
Reports, Find Cage, Save, Filter

See Common Procedures.

Tip: Tailtip date is the same as Genotype date.

6.14 T-Wean

Use the T-Wean tab-page to move pups from breeder cages containing litters to holding cages (which can be created and edited on the Cage tab-page of the Transgene Manager.) Select a Cage to Wean and a Destination Cage, Then drag animals from the top Animals in Cage window to the bottom Animals in Cage window. Once you have weaned a pup, you cannot return it to a breeder cage.



Tip: Cages will only appear under Cage to Wean if they contain pups.

Reports, Find Cage, Save

See Common Procedures.

Tip: You can't quick-edit animals once they have been moved to holding cages

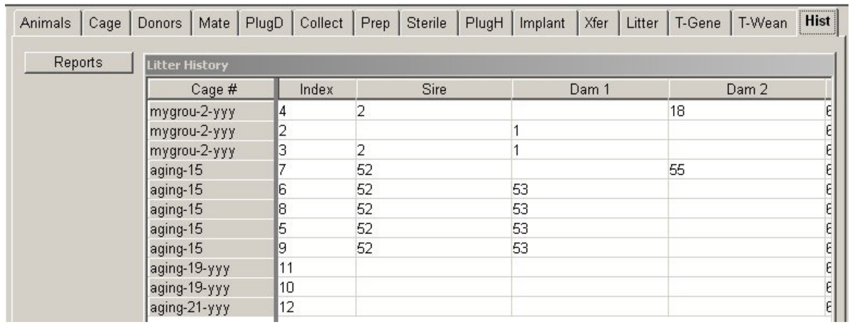
Hide Unweaned/Hide. Weaned

Select a weaned animal in the Weaned Animals window, or an unweaned animal in the Animals to be Weaned window. Press the appropriate Delete button to permanently remove the selected animal. Alternately, you can drag the selected animal to the trash can icon.

Filter

See "Filtering by Time Period" in Common Procedures.

6.15 Hist



The Hist tab-page shows you a history of all litters created in the Transgene Manager.

Reports

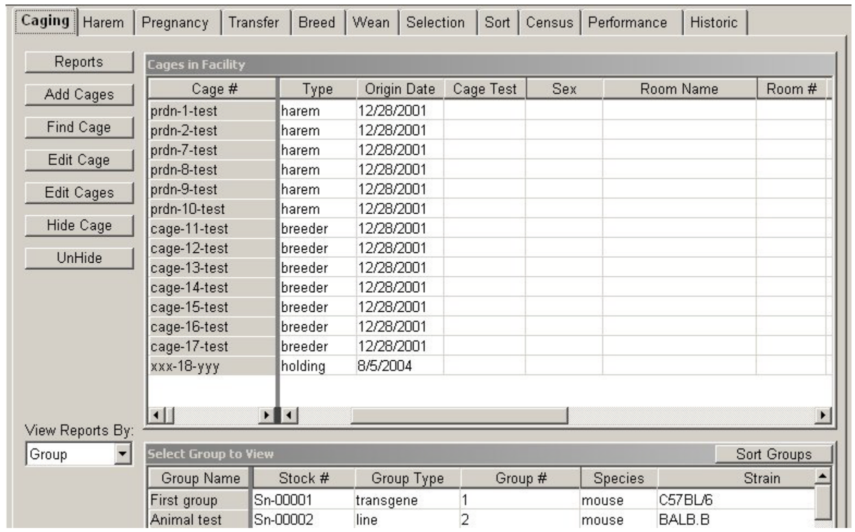
See Common Procedures.

Notes

7. Production Manager

7.1 Caging

The Production Manager allows you to perform a different type of breeding - harem breeding. On the Caging tab-page you can create host, breeder, and harem cages for the selected group. Holding cages are used to hold animals not currently involved in mating. Breeder cages are for animals that have been transferred from harem cages and are waiting to have litters. Harem cages hold several animals of both sexes for the harem mating process. Select a group to view in the lower window to view and manipulate information for the cages in that group.



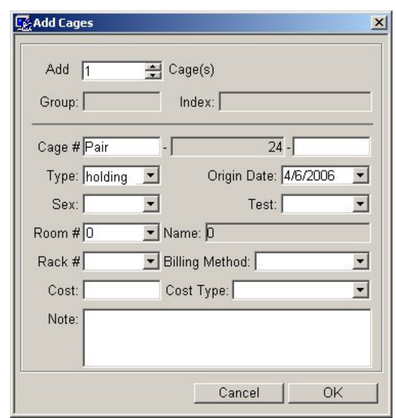
Tip: The Cage, Transgene, and Production Managers use different methods to keep track of animals. It's a good idea to have one style of mating per group, and to use that manager to take care of all the group's caging and mating needs.

Reports, Find Cage, Edit Cage, Hide Cage, UnHide

See Common Procedures.

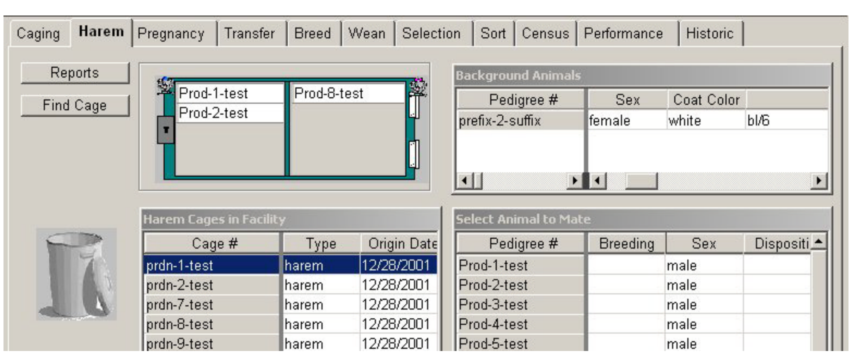
Add Cages

Press the Add Cages button to add one or more cages to the currently selected group. You can select "holding," "harem," or "breeder" for the cage type. Harem cages hold any number of harem breeding males and females. The breeder cages are for keeping track of animals that have become pregnant.You can set the maximum number of animals per holding cage under Options in the menu toolbar. The Cage # is formed from part of the selected group name and the next number in that sequence of cages.



View Reports By

Choose "Group" to view reports for the currently selected group. Choose "All" to view the reports for all current cages in all groups.



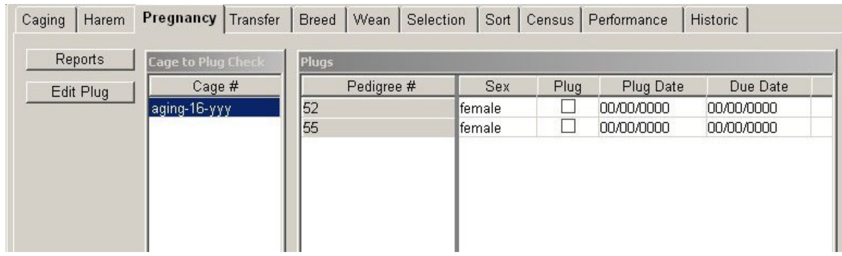
7.2 Harem

The Harem tab-page provides a place for you to put animals into harem cages for breeding purposes. To place animals in a harem cage, first select one from the Harem Cages in Facility window. Drag female animals (regular or background) to the right side of the cage picture; drag male animals to the left side. To remove animals from the selected harem cage, drag them to the trash can under the Find Cages button. You can place as many animals as you like in the harem cages.

Tip: This is only one style of mating. Use the Cage or Transgene Managers to perform different types of matings.

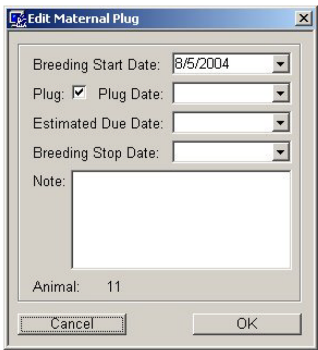
Reports, Find Cage

See Common Procedures.



7.3 Pregnancy

Use this tab-page to edit plugs for females in harem cages. Select a cage to plug check, and then edit plug information for the animal selected in the Plugs window.



Reports

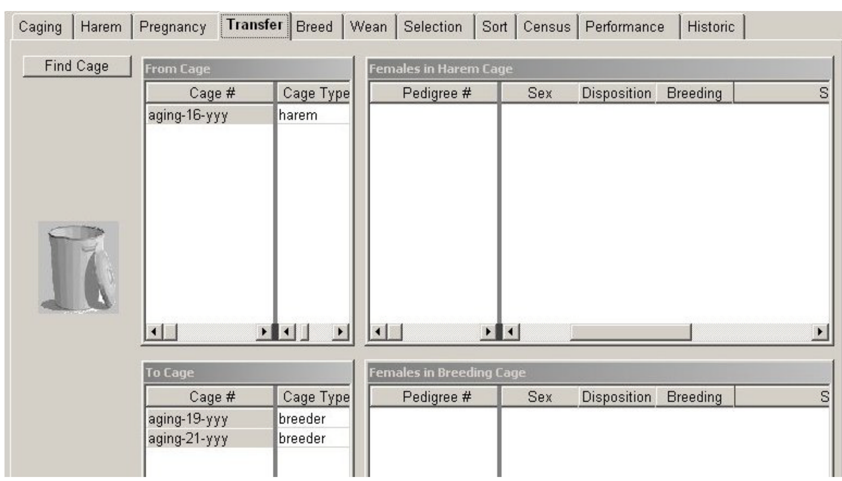
See Common Procedures.

Edit Plug

Select a cage to plug check and an animal from the list of Plugs, then press Edit Plug to open a new edit window. You can also double-click on an animal to edit a plug.

7.4 Transfer

The Transfer tab-page allows you to move female animals from harem cages into breeder cages. Select the desired harem cage and breeder cage, then drag animals from Females in Harem Cage window to the Females in Breeding Cage window. To remove animals, drag them to the trash can pictured under the Find Cage button.



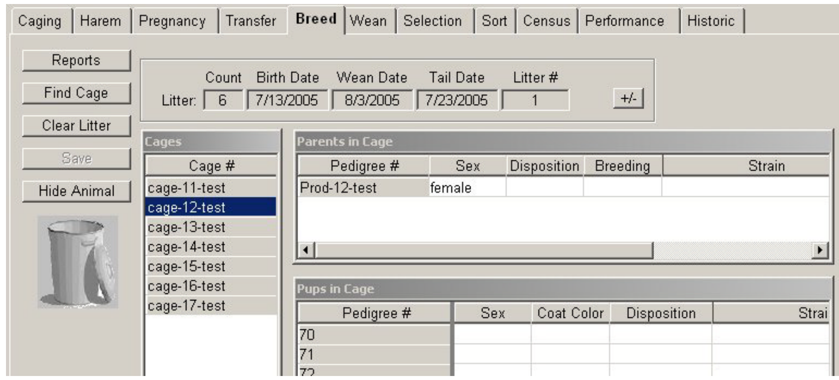
Find Cage

See Common Procedures.

7.5 Breed

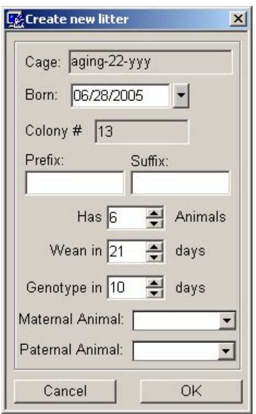
Breed is similar to the Litter tab-pages in other managers. From here you can set up litters for animals in your breeding cages. Choose a breeder cage from the Cages list to view litter information, as well as breeder females and pups currently in the cage. Note that you can only create one litter per breeding cage here. To edit pup information, click in the provided fields, then type or use the drop-down lists. Breeder information cannot be edited here. Because editing litters is such a common activity, entering information has been simplified on the Breed tab-page.

Click in the Pups in Cage window to directly edit pup information manually or with drop-down lists.



Tip: **Using the +/- buttons changes litter size, but deleting animals from a litter does not. Use +/- if you have entere litter size incorrectly.**

Reports, Find Cage, Save



See Common Procedures.

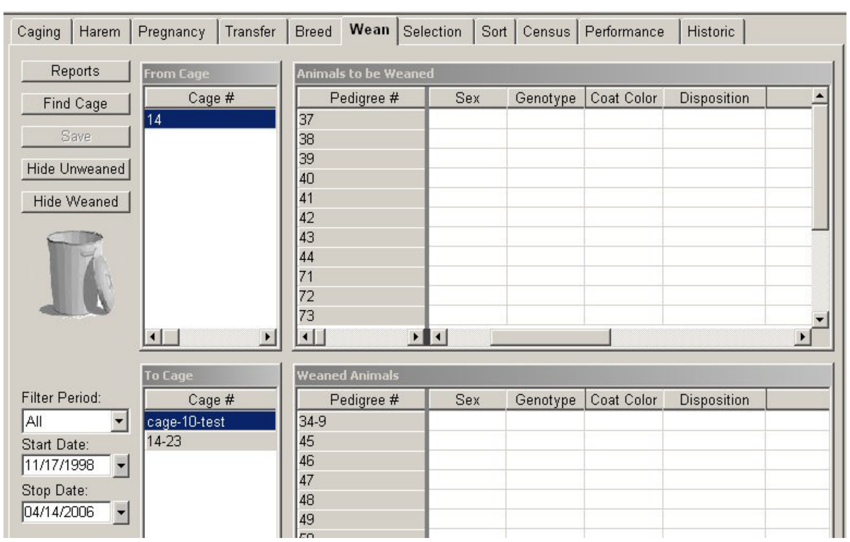
Create/Clear Litter

This button appears as “Create Litter” if there is not currently a litter in the selected breeder cage. Press Create Litter to enter new litter information, then press OK to save changes. The button becomes “Delete Litter” if the breeder cage already contains a litter. Press Delete Litter to remove all current pups and litter information.

Tip: **Set Clear Litter options on the Cage Mgr. tab-page of the Options menu on the menu toolbar. You can choose to remove pups from cage, remove pups and hide, or leave pups in cage when a litter is deleted. By default, pups are removed from the mating cage but not hidden.**

Hide Animal

Select a pup, then press Hide Animal to permanently remove the animal. You can also use the +/- button beside the litter information at the top of the tab-page to add or subtract one of the pups, but you cannot choose which pup will be hidden.



7.6 Wean

From the Wean tab-page, you can wean pups from breeder cages into holding cages. Select a breeder cage in the top left corner and a holding cage in the lower left corner, then drag pups from the Animals to be Weaned window to the Weaned animals window. You can also edit and delete pups, or choose a period of pups to view by wean date. To edit pup information, click on an animal and use the drop down lists provided for the various fields.

Tip: Once animals have been weaned, they cannot be returned to a breeder cage.

Reports, Find Cage, Save

See Common Procedures.

Tip: You can’t quick edit animals once they have been weaned.

Hide Unweaned/Hide Weaned

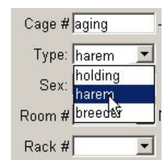
Select a weaned animal in the Weaned Animals window, or an unweaned animal in the Animals to be Weaned window. Press the appropriate Hide button to hide the selected animal. Alternately, you can drag the selected animal to the trash can icon.

Filter

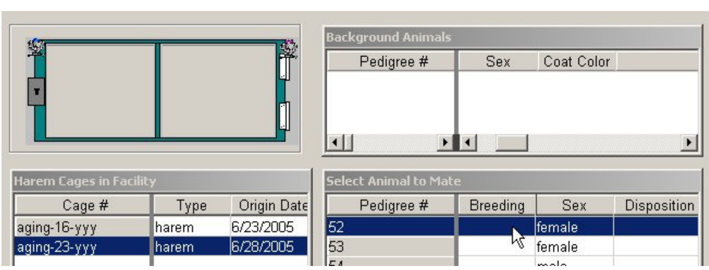
See “Filtering by Time Period” in Common Procedures.

Tutorial: Harem Breeding

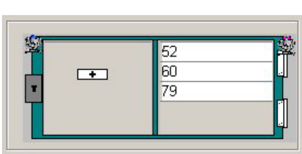
Assignment: You wish to perform some harem breeding for your aging experiment.

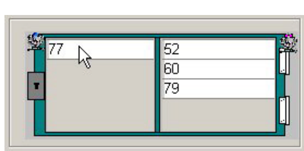


1. On the Cages tab-page, press the Add Cages button. Add one cage of type harem, one cage of type breeder, and one cage of type holding.
2. Go to the Harem tab-page, and select your newly created harem cage.
3. Select a female animal from the Select Animal to Mate window, and drag her to the right side of the mating cage.



4. Continue to drag breeding animals of both sexes (males go on the left) to the harem cage until you are satisfied with the number.
5. Your animals have become pregnant! Move to the Transfer tab-page.
6. Choose your harem cage in the From Cage list, and your previously created breeder cage in the To Cage list. Drag a female from the harem cage to the breeder cage.

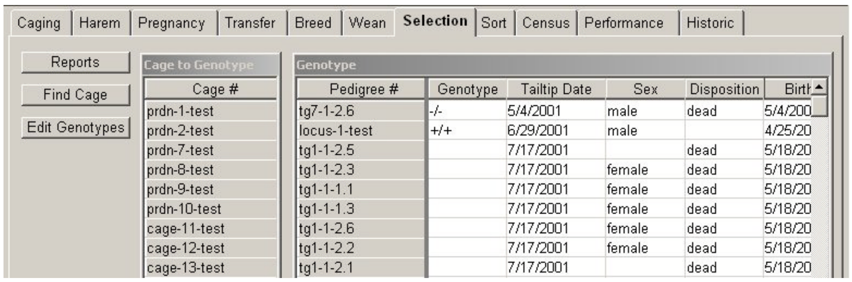




7. Go to the Breed tab-page. Select your breeder cage, and press the Create Litter button.
8. Enter any pertinent litter information, then press OK to create the litter.
9. Your animals are ready to be weaned. Move to the Wean tab-page.
10. Choose your breeder cage in the From Cage list, and your previously created holding cage from the To Cage list.
11. Drag the desired pups from the breeder cage to the holding cage.

7.7 Selection

The Selecion tab-page makes it easy for you to enter and edit genotyping information for your production breeding operations. You can edit information for animals in the selected holding cage to genotype directly in the Genotype window by typing in the provided fields or using the drop-down lists. Use the filter options to limit your animal field of view by tailtip date.



Reports, Find Cage, Edit Genotypes

See Common Procedures.

Tip: Tailtip date is the same as Genotype date.

Filter

See "Filtering by Time Period" in Common Procedures.

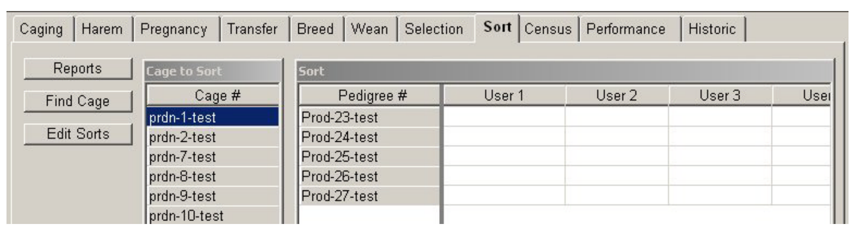
7.8 Sort

The Sort tab-page provides a way for you to quickly access and edit information from your user-defined animal fields. Edit and view user-defined fields by pressing Group Specific Lists in the Lists menu on the menu toolbar. Select a cage in the Cage to Sort window to view animals in that cage in the Sort window.

Tip: Double-click on an animal in the Sort window to access an Edit Animal window.

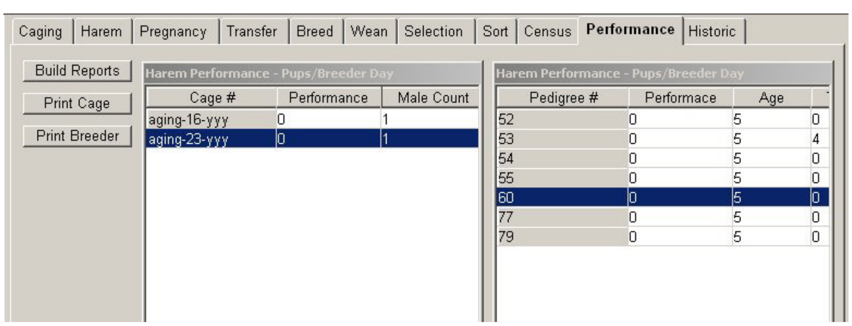
Reports, Find Cage, Edit Sorts

See Common Procedures..



7.9 Census

The Census tab-page is currently not functional.



7.10 Performance

Use the Performance tab-page to see breeding performance statistic for breeders in harem cages. View harem cage performance on the left, and harem breeder performance on the right.

Build Reports

The Build Reports button will bring up a copy of the most recent performance data for the currently selected group.

Print Cage, Print Breeder

See Common Procedures.

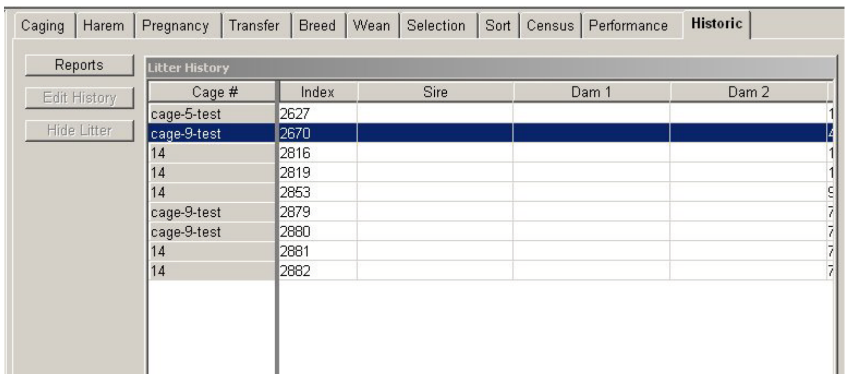
7.11 Historic

On the Historic tab-page, you can view litter information for all mating and breeding cages. You can also see this information on the Hist tab-page of the Transgene Manager and the History tab-page of the Cage Manager.

Reports, Edit History, Hide Litter

See Common Procedures.

Tip: Edit History and Hide Litter are not meant for regular data entry; it's a good idea to disable them for all non-administrative users.

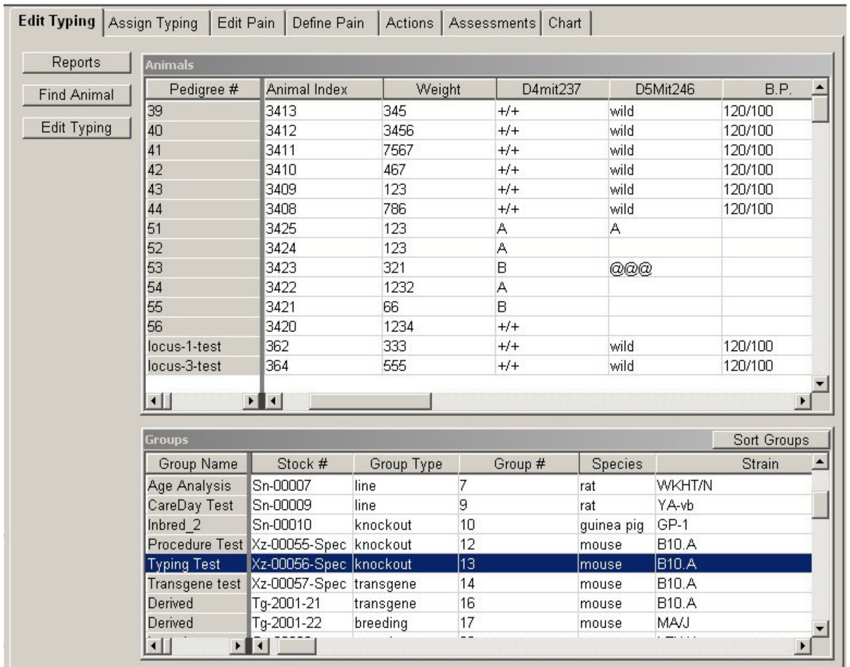


Notes

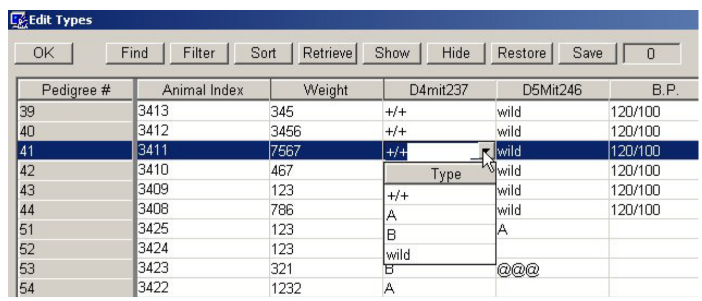
8. Animal Assessment

8.1 Edit Typing

You can view the Pedigree #s and Animal Indexes for your animals on this tab-page, as well as any customized phenotypes or genotypes. This allows you to keep track of additional animal information that has not been included with the program, such as animal "hair type," "weight," or "adult length." Go to the Assign Typing tab-page to create these custom types. Select a group from the Groups list to view any assigned types and edits made for that group. To enter information into your custom fields, left click in the field to open a type entry dialog box. Press Cancel to exit type entry or Clear to erase the current typing information. To enter information, type in the empty field at the bottom of the box and press Enter to save changes. Right click in a field to access remote capture from scales if you are entering data of type weight. Note that you will not be able to move away from this page until you have entered data here, or pressed Cancel.



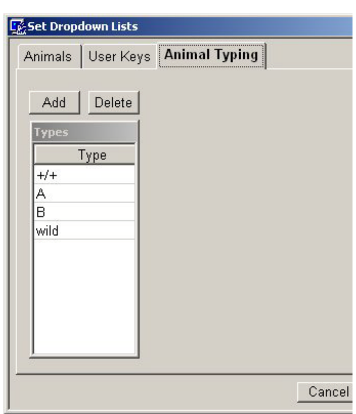
Tip: If you wish to keep periodic instead of one-time records, use the Actions and Assessments tab-pages.



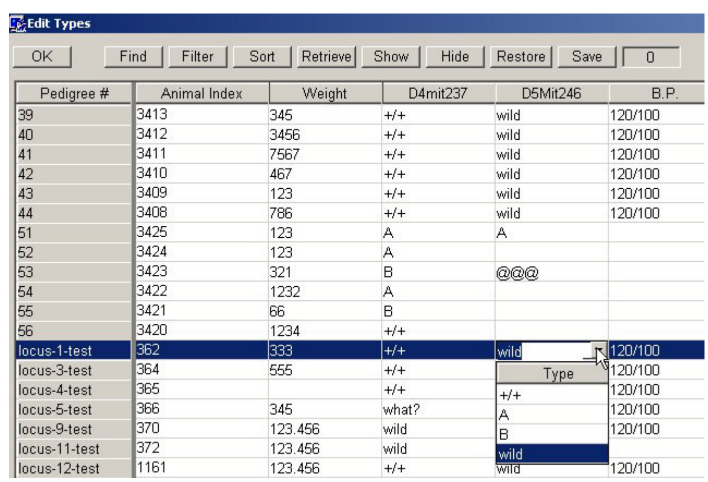
Reports, Find Animal

See Common Procedures.

Edit Typing



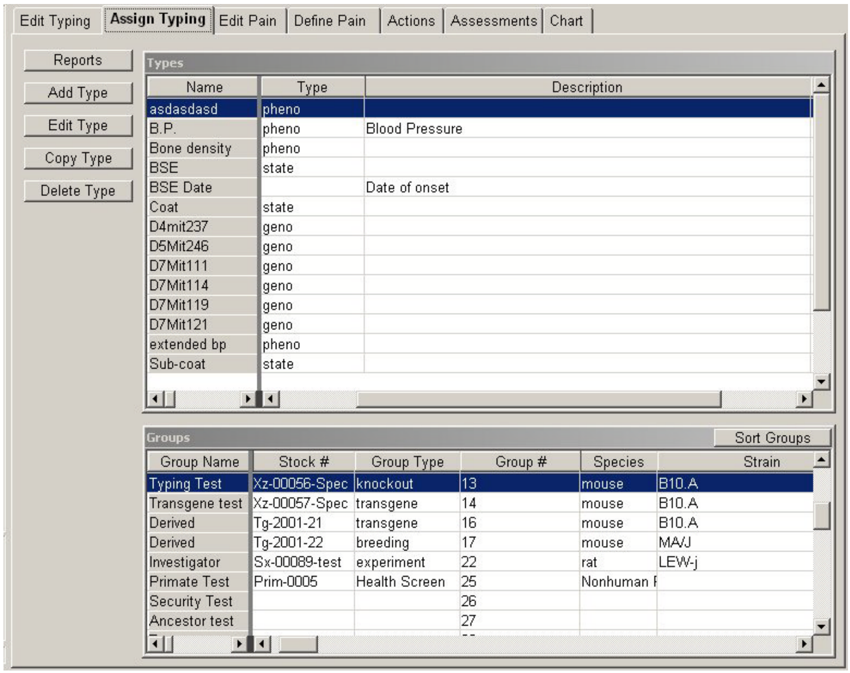
Edit information in custom fields you design on the Assign Typing tab-page. Access drop-down list customization by pressing Group Specific Lists on the Lists menu in the menu toolbar (choose the Animal Typing tab-page). Items



entered in this list will appear in the drop-down list See Common Procedures for more information on Edit.

Tip: Each group can have only one animal type drop-down list.

8.2 Assign Typing

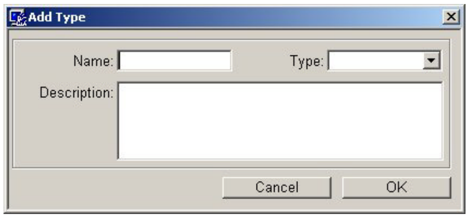


Assign various genotypes and phenotypes (typically, values that are not updated periodically) to appear for data entry on the Edit Typing tab-page. Select the group you wish to type for, and then add, edit, copy or delete types. When you add a type, a new field will be created for every animal in the currently selected group on the Edit Typing tab-page. You can enter data into these fields using the methods described under Edit Typing. To edit the drop-down list for your new types, click on the Group Specific Lists item in the Lists menu on the menu toolbar, and select the Animal Typing tab-page.

Tip: Types are group-specific. To transfer a type between groups, use Copy Type.

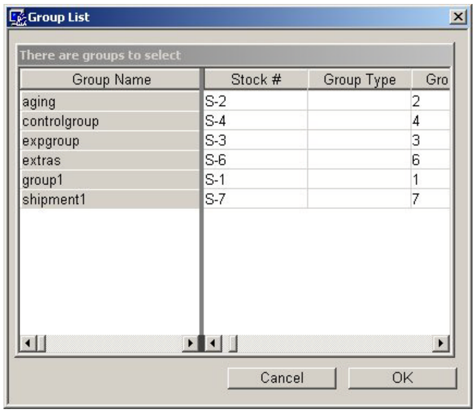
Reports, Edit Type, Delete Type

See Common Procedures.



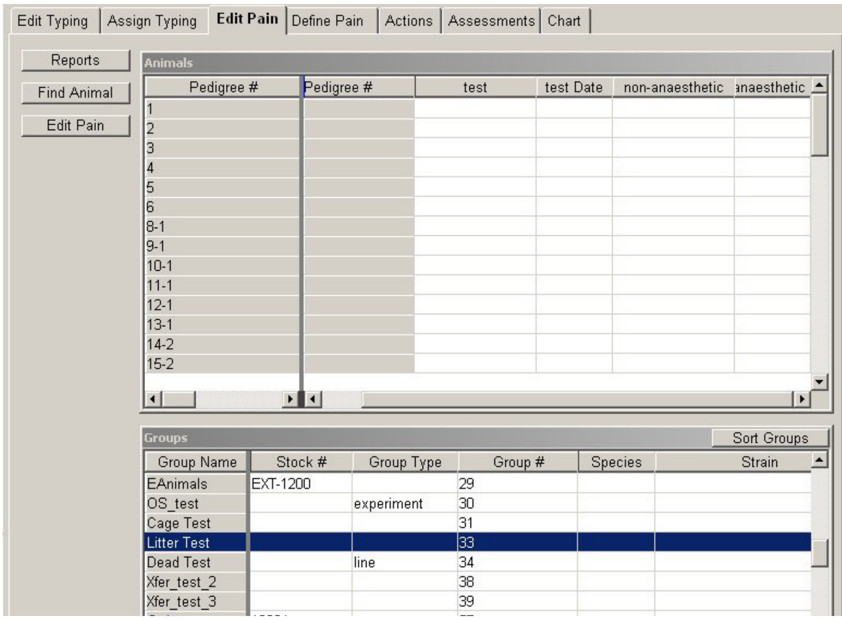
Add Type

Press the Add Type button, then enter the name and description for the new type. Choose a type of genotype, phenotype, or state phenotype and press OK to create the type.



Copy Type

Copy Type allows you to copy a new type to one or more groups. Select a group from Groups window on the bottom of the Assign typing tab-page, then select a type from the Types list on the top of the page. Press Copy Type, then highlight one or more groups from the list. Press OK to transfer the selected type to your chosen group(s). This type will now appear in the Types window when one of the new groups is selected, and on the Edit Typing tab-page.



8.3 Edit Pain

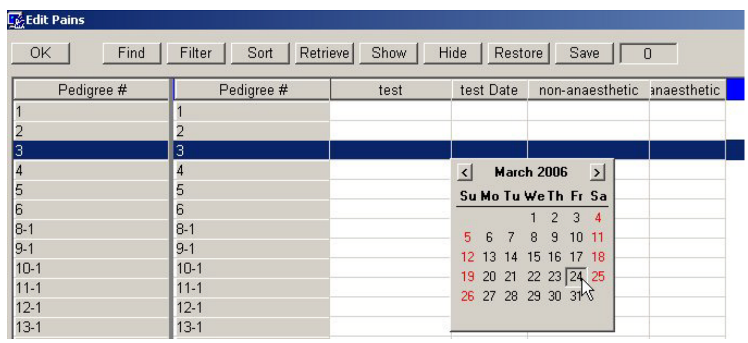
Use the Edit Pain tab-page to create pain records for animals in your various groups. Once you have defined pain types on the Define Pain Tab-page, you can enter pain information and dates on this tab-page. You can add as many pain fields as you like. This tab-page is not currently in wide use for rodent research, but could become more prevalent in the future.

Reports, Find Animal

See Common Procedures.

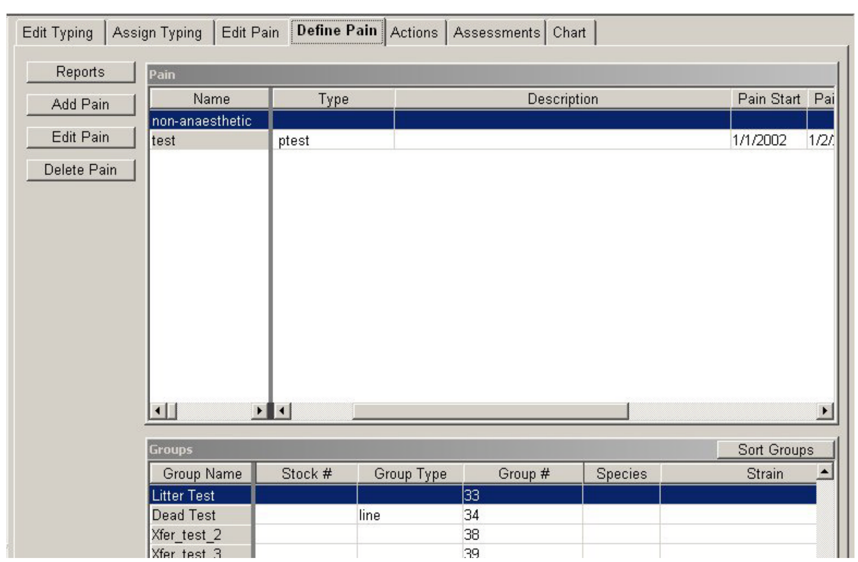
Edit Pain

Press the Edit Pain button to access an Edit Pains page for spreadsheet-style editing. For each pain type you define and for each animal, you are provided with a field to enter pain text and a field for pain date. The text fields are manual data entry (no associated drop-down lists).



8.4 Define Pain

Select a group from the bottom window of this tab-page, then add, edit, or delete pain types for that group. Pain types created on this page will create new fields for information entry on the Edit Pain tab-page. This tab-page is not currently in wide use for rodent research, but could become more prevalent in the future to maintain regulatory compliance.

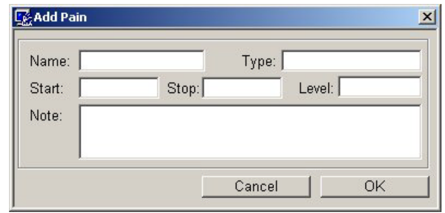


Tip: Pain types belong to the group for which they were created.

Reports, Edit Pain, Delete Pain

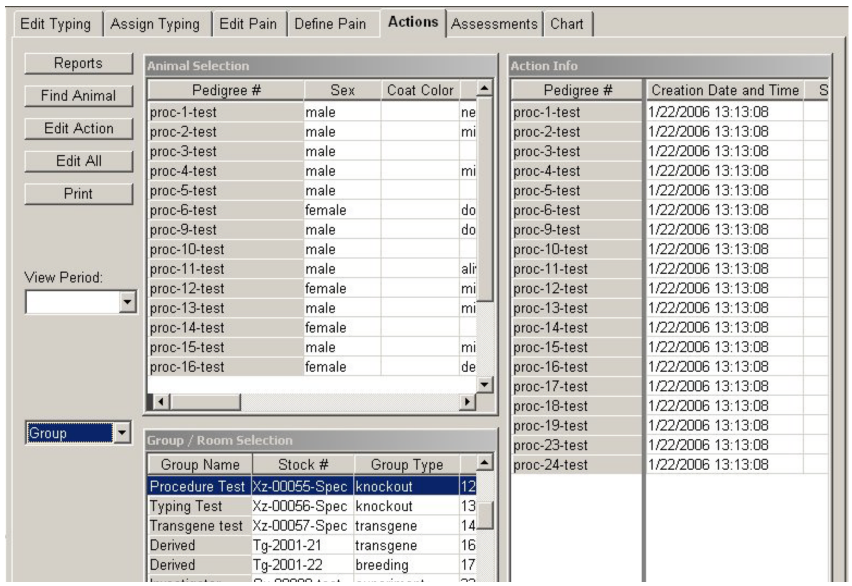
See Common Procedures.

Add Pain



Press this button to open a new Add Pain window. Enter information into the provided fields then press OK to create the new pain type.

8.5 Actions



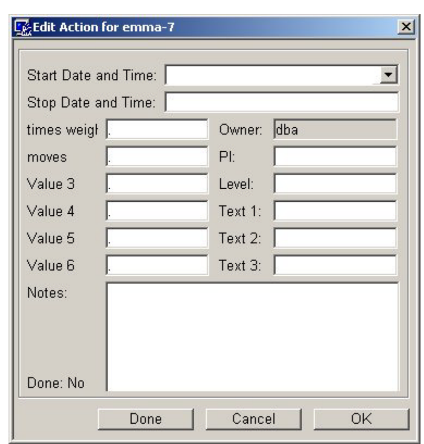
Actions is similar to Edit Typing and Edit Pain in that it allows you to associate new types of data with your animals. The difference is that you can keep track of periodic actions for your animals, such as whether they have been fed and watered on a given date. First, select the group you wish to keep track of actions for. Then, go to the Options menu on the menu toolbar and press Set Options. Use the Assess tab-page to set Action options for the currently selected group, then press OK. Note that each group keeps a separate record of actions - value names do not port between groups. Within the set period you specified (for example, every other day, or every week), you can rccord new animal observations that will be stored on this tab-page based on your customized format. The Action Info window displays all action information that has been recorded for animals in the selected group.

Tip: The speed of your computer could affect your ability to manage frequent assessments for a large number of animals.

Reports, Find Animal

See Common Procedures.

Edit Action



Select an animal, then press this button to open a new Edit Action window. The title bar of this window will tell you which animal you are currently working with. Note that you can only enter numeric values into the fields you customized on the Assess tab-page of the Set Options menu item; non-customizable fields are also provided for text entry on the right. During each specified period, you can use Edit Action to create one animal record.

Edit All, Print

See Common Procedures.

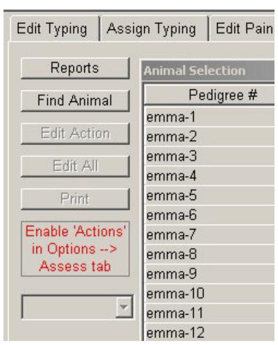
Tip: Once the edit period has passed, for example if you set the period as one week and the week comes to an end, you will no longer be able to edit information for that period. You can, however, still view past records.

View Period

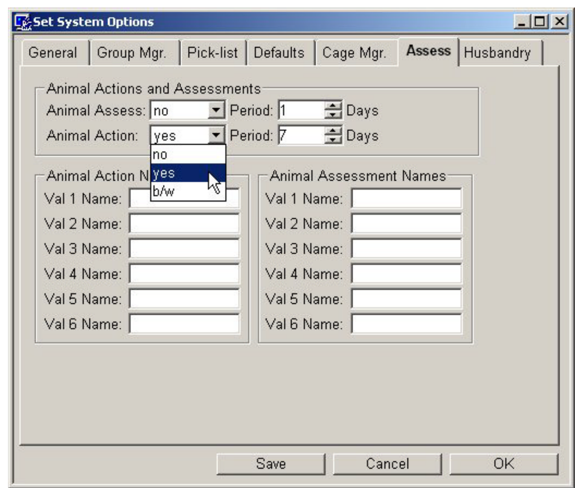
Choose the view for the Action Info window on the right. View all action records, current action records, or records from the previous period.

Tip: If you turn off Actions using Set Options, you will not lose your old records. However, it's best not to turn this off during the assessment period because it will disrupt data calculations.

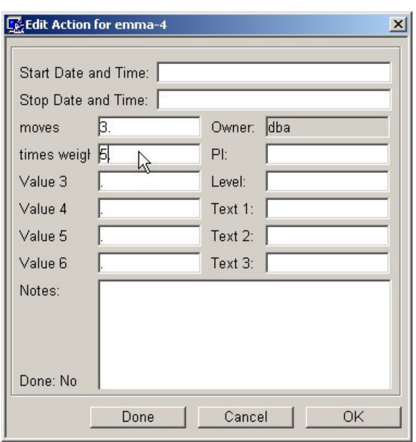
Tutorial: Setting up Actions Record Collection



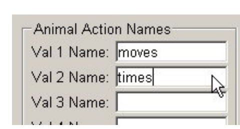
Assignment: You want to collect actions data for your "aging" group.



1. Go to the Actions tab-page of the Animal Assessment manager.
2. Select the group "aging" in the group selector.
3. Go to the Options menu on the menu toolbar, and press Set Options.



4. On the Assess tab-page, set Animal Action to "yes" and set the period to 7 days.
5. Enter the names for your actions in the Value 1-6 fields under Animal Action Names.
6. Press OK to save your changes.
7. If the tab-page still says it is disabled, go to a different tab-page and then return to Actions.
8. Make sure "aging" is still the selected group.
9. Select an animal, then press Edit Action to open a new window.

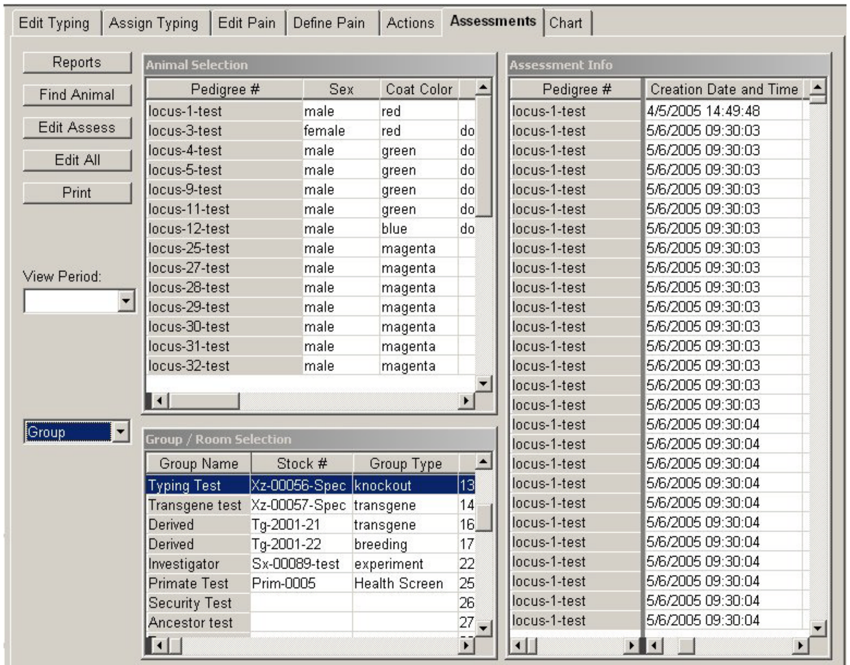


10. Enter numerical values into your customized fields. Use the non-customizable text fields to enter additional information.
11. Press OK to save Edit Action changes.
12. Press Edit All to edit information for all animals in the selected group.
13. In seven days, return to this tab-page to enter updated information. Your previous records will have been stored, but can no longer be edited

14. View old records in the Action Info window, or press Reports.

8.6 Assessments

Assessments works basically the same as Actions; it allows you to associate new types of data with your animals. You can keep track of periodic information for your animals, such as their weight or tumor size on a given date. To use this tab-page, first select the group you wish to keep track of assessments for. Note that each group keeps a separate record of assessments. Then, go the the Options menu on the menu toolbar and press Set Options. Use the Assess tab-page to set Assessment options for the currently selected group, then press OK and return to the Assessments tab-page At the beginning of each period you specified, you can rccord new animal observations that will be stored on this tab-page based on your customized format.



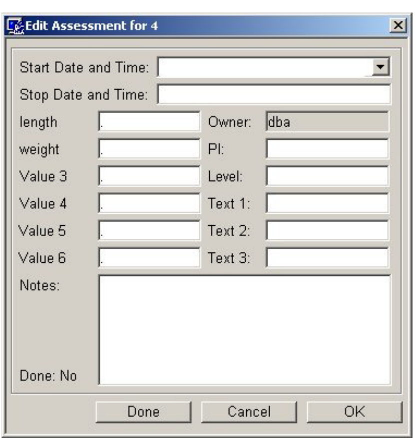
Tip: The speed of your computer could affect your ability to manage frequent assessments for a large number of animals.

Reports, Find Animal, Edit All, Print

See Common Procedures.

Edit Assess

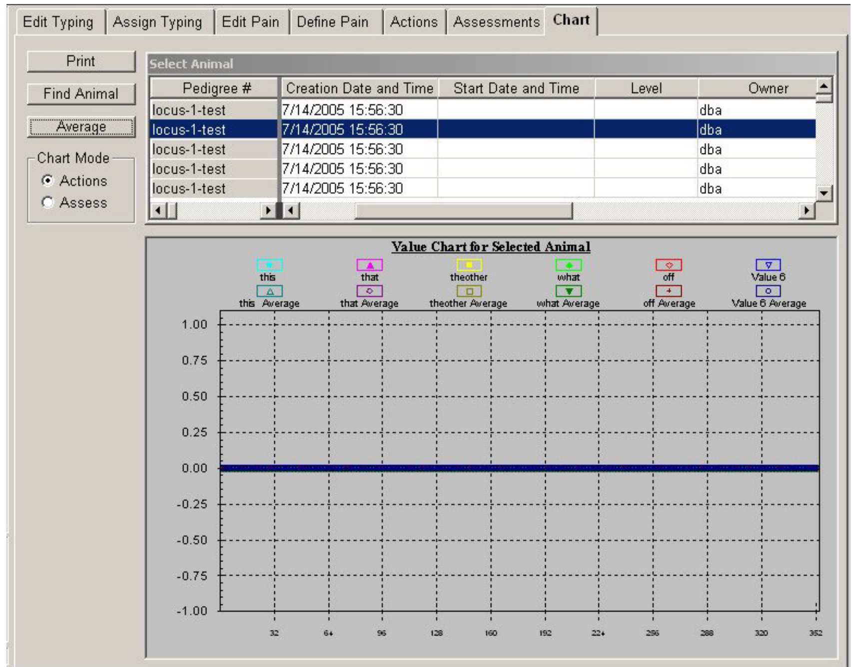
Select an animal, then press this button to open a new Edit Assessment window. The title bar of this window will tell you which animal you are currently working with. Note that you can only enter numerical values into the fields you customized on the Assess tab-page of the Set Options menu item; non-customizable fields are also provided for text entry on the right. During each specified period, you can use Edit Action to create one animal record. For example, if you set the assessment period to two days, you will have access to a new record window every other day.



Tip: Once the edit period has passed, for example if you set the period as one week and the week comes to an end, you will no longer be able to edit information for that period. You can, however, still view past records.

View Period

See Section 8.5 for information on View Period.



8.7 Chart

The Chart tab-page displays information procured from the Actions and Assessments tab-pages in a visual chart format. On one of these tab-pages, select a group for which you have been keeping track of actions and assessments. Once you have chosen a group, go to the Chart tab-page, select an animal, and press Average to see visual results for that animal's actions or assessments (depending on which option is currently selected in Chart Mode). The Chart tab-page is the reason that you can only enter numerical data into your customized Value fields on the Actions and Assessments tab-pages.

Tip: If the selected animal does not have the required information attached, "No Data" will be displayed in the lower left corner of the tab-page.

Print, Find Animal

See Common Procedures.

Average

Select an animal, then press Average to see the chart results.

Chart Mode

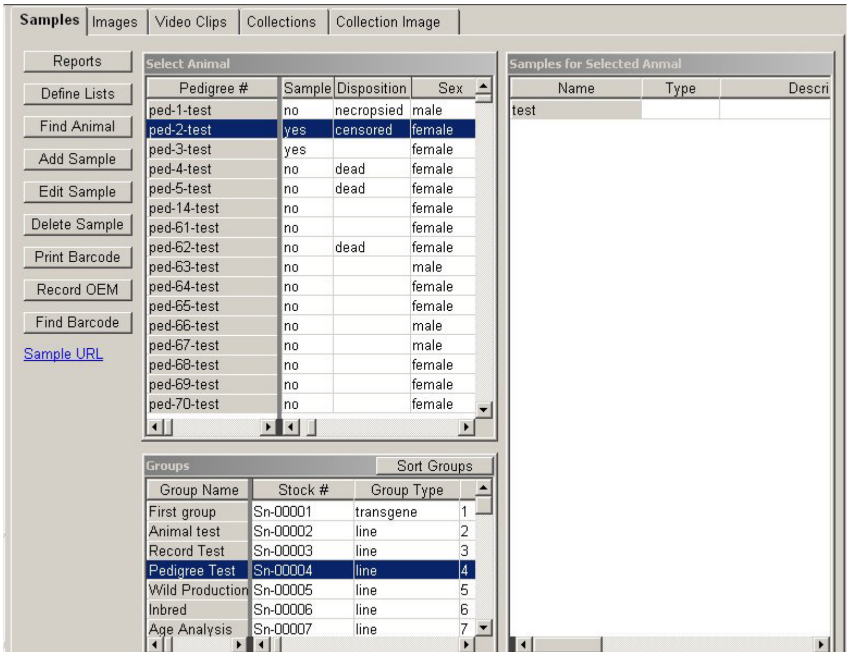
Select which data you wish to use to create a chart for the selected animal - Actions or Assessments.

Tip: Due to the large amount of data generated by Actions and Assessments, it can take a few minutes for the Chart tab-page to compile data.

Notes

Notes

9. Sample Manager



9.1 Samples

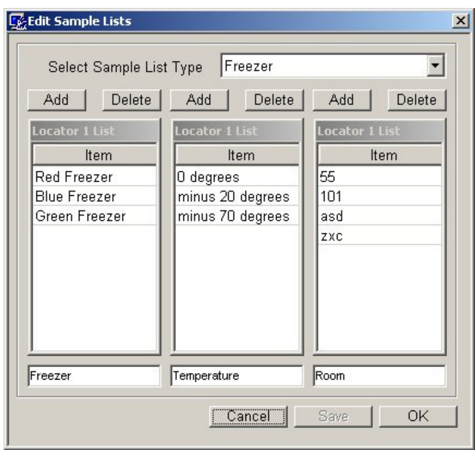
Use the Samples tab-page to keep track of freezer, tube, straw, and generic animal samples. On this tab-page, samples are associated with the animals from which they were procured. Select the desired group and animal in order to view, add, or edit samples for that animal.

Tip: If you want to associate samples with more than one animal, use the Collections tab-page.

Reports, Find Animal, Edit Sample, Delete Sample

See Common Procedures.

Define Lists

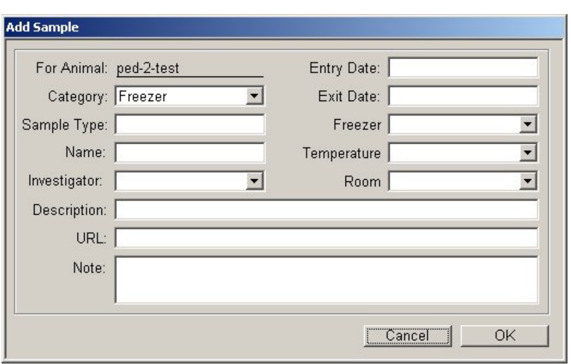


You can choose to customize up to three lists for each sample list type that will appear each time you add a new sample of that type, or a new image. Use the drop-down menu to create lists for freezer, tube, straw, generic, or image categories. To activate a new list, press the add button above the list, then enter text. Add additional items in this manner, and set the list title in the field under the list box. Press Save and OK when you are done to save changes to lists. You can come back and edit list information at a later date by simply clicking in the desired field.

Tip: You can select a category of Freezer, Tube, Straw or Generic when creating samples or collections; New images, video clips, and collections images have pre-determined categories.

Add Sample

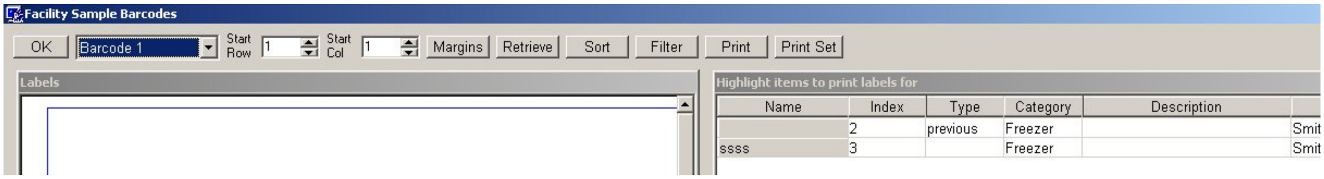
Press this button to open a new Add Sample window. The pedigree number of the selected animal will appear in the For Animal Field. Select a category from the drop-down list (freezer, tube, straw, or generic) and note that the lists you customized using Define Lists appear on the right. Enter the desired information, then press OK to create the new sample.



Tip: You can attach several samples to an animal.

Print Barcode

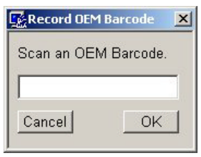
Select a group, then press Print Barcode to open a window from which you can print any barcodes associated with samples for animals in the selected group. Use the Record OEM function to attach barcodes to samples.



Record OEM

If you have a barcode scanner attached to your system, you can use the scanner to record the barcodes attached to samples. Press this button, and then scan the barcode to enter it into Facility.

Tip: You must have a sample select before you can record a barcode.



Find Barcode

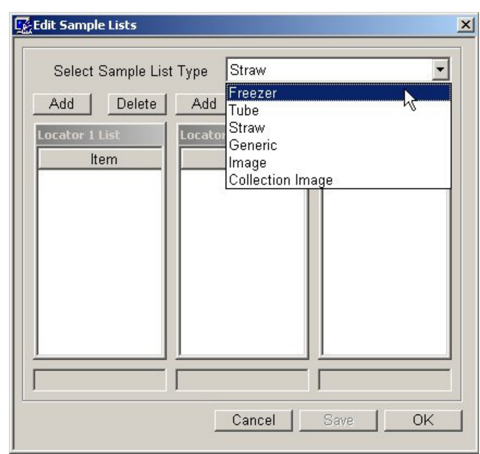
Once you have recorded barcodes, you can find a sample in Facility by scanning its barcode. Press this button and scan the label for the desired sample, and you will have instant access to the sample in the system.

Sample URL

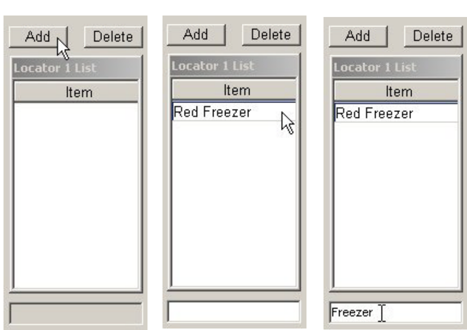
If you select a sample that has an associated URL (entered when you add or edit the sample), you can access that URL directly from the Samples tab-page. Click on this blue link to go to the recorded website (for example, a website containing this image or related images.)

Tutorial: Define Lists to Create a Freezer Sample

Assignment: You wish to create a freezer sample for your "aging" group.

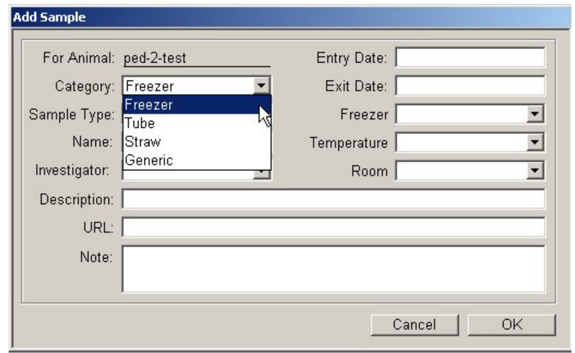


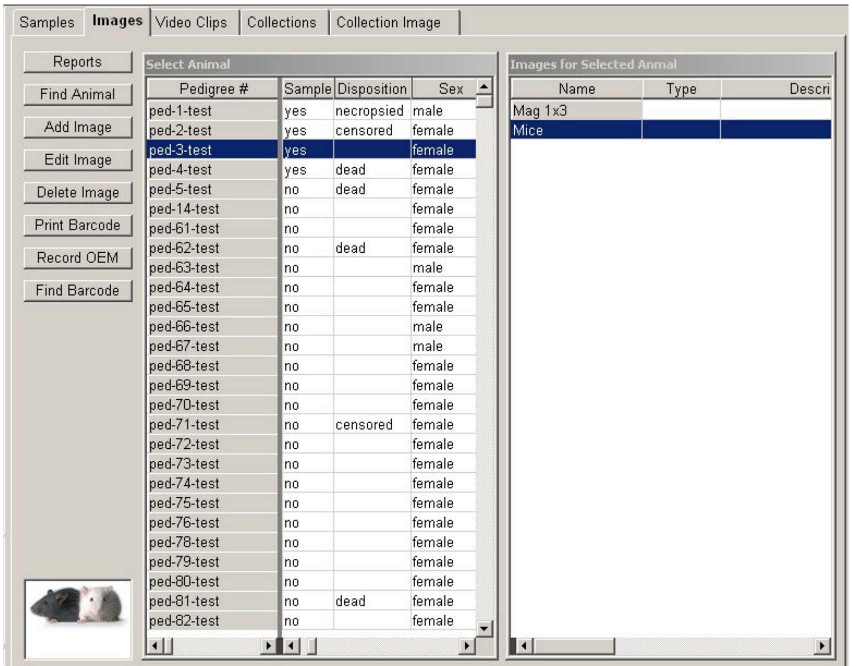
1. Go to the Samples tab-page of the Sample Manager.
2. Press Define Lists, and select Freezer from the drop-down menu.
3. Press the Add button above the first list, Locator List 1.
4. Enter text into the new field, such as "Red Freezer."
5. Enter a list title such as "Freezer" into the window below Locator List 1.
6. Press Add again to add more items to your new list, or add additional lists if you want.



7. Press Save and OK to save changes to the new list.
8. On the Sample tab-page, select the group "aging" and select an animal from the group.
9. Press Add Sample, and set the sample category to Freezer.
10. Note that your customized list(s) appear on the right side.
11. Use the drop-down menus for your new fields to access the lists you created.

12. Enter any additional information into the provided fields.
13. Press OK to create the new sample.
14. Once you have created a sample, the Sample field in the Select Animal window will change to “yes.” You can attach several samples to each animal.

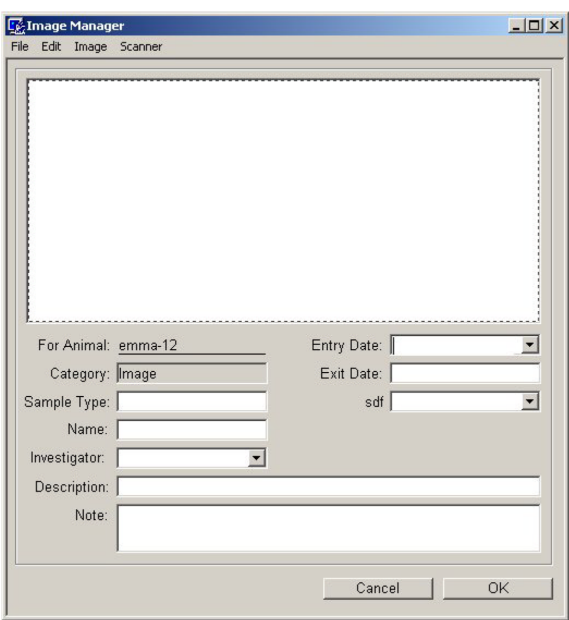




9.2 Images

The animals on this tab-page belong to the group currently selected on the Samples tab-page (or elsewhere in FACILITY, such as in the Group Manager). The Samples tab-page also contains the Define Lists button, which you can use to define image lists. Select an animal in the Select Animal window to view a list of attached images in the Images for Selected Animal window; a “yes” will appear in the Sample column if there is an attached image. Use the Images tab-page to add, edit or delete image records for the selected animal, or to attach barcodes to images. You can also view the selected image for the current animal in the lower left corner of this tab-page.

Tip: The image will be scaled to fit in the corner box.



Reports, Find Animal, Edit Image, Delete Image

See Common Procedures.

Add Image

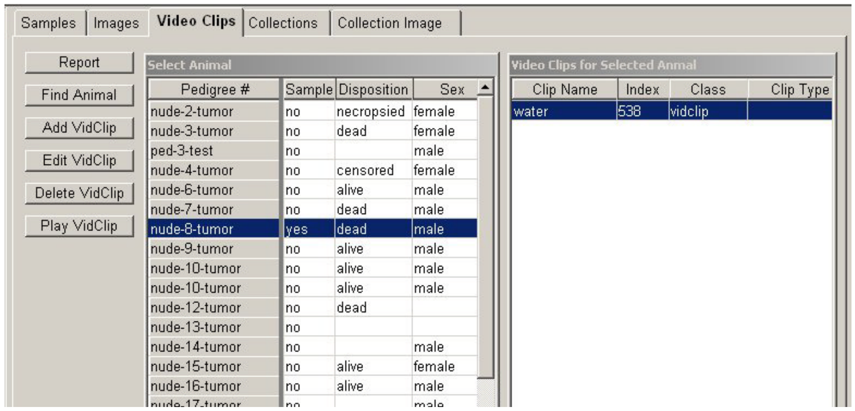
Press this button to open a new Add Image window. The image space of this window is similar to the text space used for adding notes, but you cannot click in the space to add items or text. The dotted line around the image space shows that an image has not yet been opened; it will be removed once you add an image. To add an image, first press Open in the File menu. Then, select a file type of .bmp, .jpg, .tif, or .gif at the bottom of the “Select image file” window, and choose the image you want from your system. By default, the file type is set to .bmp. Alternately, you can use a scanner to attach images to an animal. Use the tools on the menu toolbar to edit your image, and then enter any desired information into the fields below. Note that any lists you customized using Define Lists on the Samples tab-page appear on the right under the image.

Tip: You can attach several images to an animal.

Print Barcode, Record OEM, Find Barcode

See section 9.1 for information on barcodes.

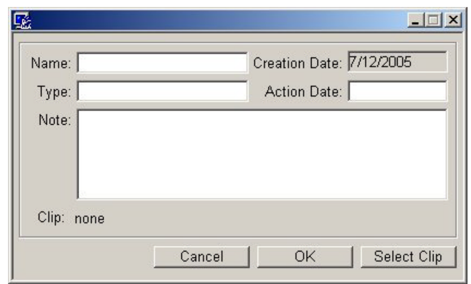
9.3 Video Clips



The animals on this tab-page belong to the group currently selected on the Samples tab-page (or elsewhere in Facility, such as in the Group Manager). Use the Video Clips tab-page to add, edit or delete video clip records for the selected animal.

Reports, Find Animal, Edit VidClip, Delete Vidclip

See Common Procedures.



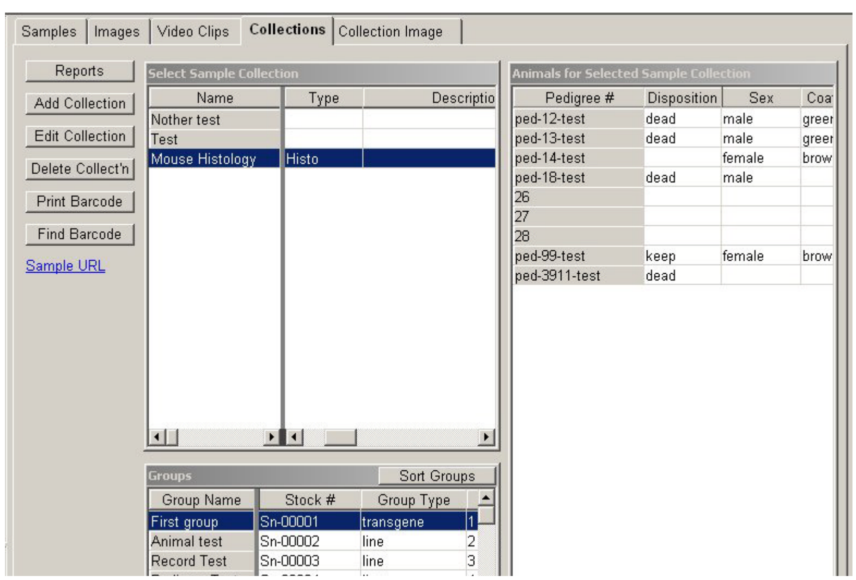
Add VidClip

Select an animal, then press Add VidClip to attach a new video clip record to the animal. Enter information into the provided fields, then press Select Clip to search your system for a video file of type .avi. Once you have located the file, press OK to attach it. The video clip name will appear in the lower left corner of this window.

Play VidClip

Press this button to play the currently selected video clip.

9.4 Collections



Select a group from the window in the lower left corner, then add, edit, or delete collections that will appear in the Select Sample collections window. When you create or edit a collection, you can assign animals to the collection from the group to which the collection belongs. You can also access the freezer, tube, straw, and generic drop-down lists customized usign the Define Lists function on the Samples tab-page.

Tip: If you want to associate samples with a single animal, it's easier to use the Samples tab-page.

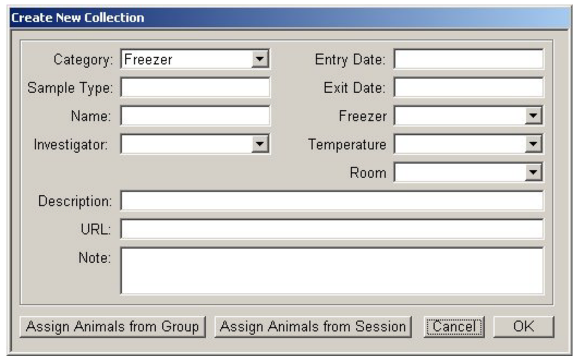
Reports, Edit Collection, Delete Collect'n

See Common Procedures.

Add Collection

Select a group, then press Add Collection. Use the drop-down menu to select a collection type, then enter information in the provided fields. Note that any lists you customized using Define Lists on the Samples tab-page appear on the right.

Assigning Animals from Group/Session - When you create or edit a sample collection, you have the choice of assigning animals to the task from a group or a session. Press Assign Animals from Group to open a new window. Select a group from the window at the bottom of the screen to view the animals in that group in the Animals to Assign from Group window.



Tip: The default group will be the one currently selected on the Collection Samples tab-pages.

Select the desired animals, then drag them over to the Animals Assigned to Image window. To remove animals from an image, select them and drag them back to the Assign Animals from Group window. Press Close when you are finished to exit this page. You can use the same method to assign animals from a previously created session; see the section on Sessions in the Application Framework chapter.

Print Barcode

Press Print Barcode to open a window from which you can print any barcodes associated with collection images in the Select Collection Image window.

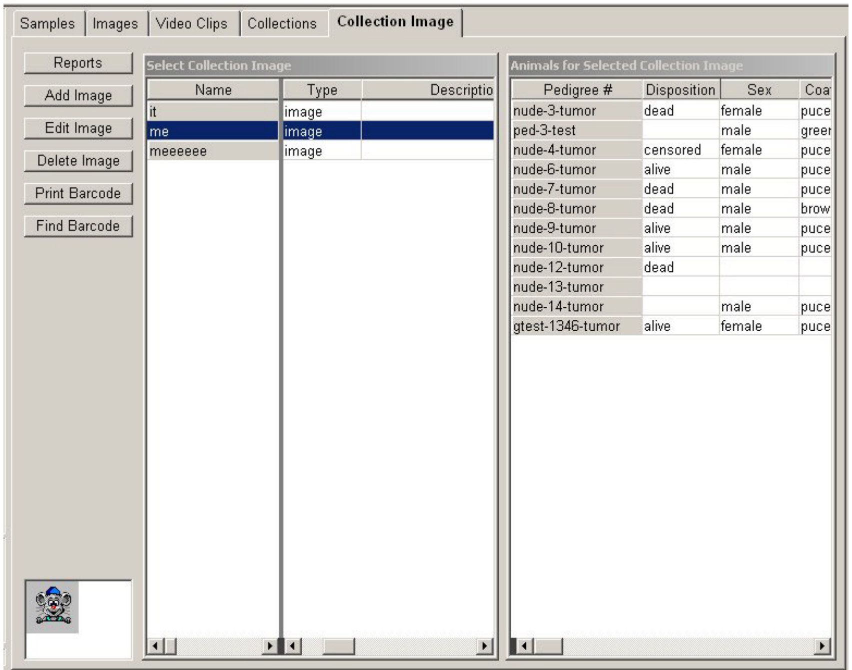
Find Barcode

Once you have recorded barcodes, you can find a collection image in FACILITY by scanning its barcode. Press this button and scan the label for the desired collection image, and you will have instant access to the collection image in the system.

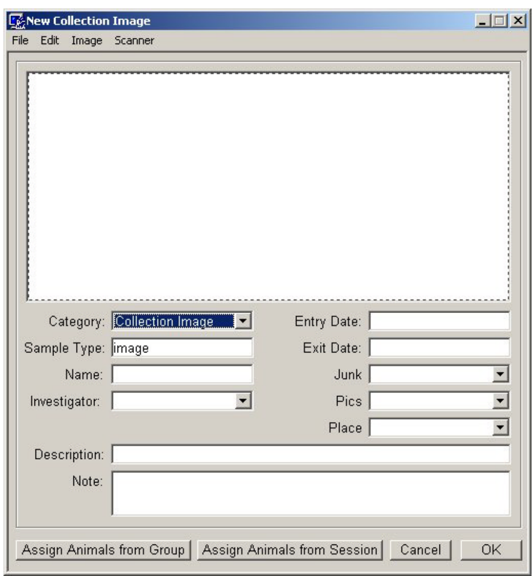
Sample URL

If you select a sample that has an associated URL (entered when you add or edit the sample), you can access that URL directly from the Samples tab-page. Click on this blue link to go to the recorded website (for example, a website containing this image or related images.)

9.5 Collection Images



This is a new tab-page that has been created for the assignment of images to several animals at a time. This is useful, for example, when tracking genotyping gels. Select an image from the Select Collection Image display on the left to view any animals associated with that collection in the Animals for Selected Collection Image window on the right. A small version of the selected collection image will appear in the window in the lower left corner of this tab-page. You can double-click a collection image to edit the selected image and associated information, or press Edit Image.



Add Image

Press this button to open a New Collection Image window. The image space of this window is similar to the text space used for adding notes, but you cannot click in the space to add items or text. The dotted line around the image space shows that an image has not yet been opened; it will be removed once you add an image. To add an image, first press Open in the File menu. Then, select a file type of .bmp, .jpg, .tif, or .gif at the bottom of the "Select image file" window, and choose the image you want from your system. By default, the file type is set to .bmp. Alternately, you can use a scanner to attach images to an animal. Use the tools on the menu toolbar to edit your image, and then enter any desired information into the fields below. Note that any lists you customized using Define Lists on the Samples tab-page appear on the right under the image.

Assigning Animals from Group/Session - When you create or edit a collection image, you have the choice of assigning animals to the image from a group or a session. Press Assign Animals from Group to open a new window. Select a group from the window at the bottom of the screen to view the animals in that group in the Animals to Assign from Group window.

Tip: The default group will be the one currently selected on the Samples or Collection Samples tab-pages.

Select the desired animals, then drag them over to the Animals Assigned to Image window. To remove animals from an image, select them and drag them back to the Assign Animals from Group window. Press

Close when you are finished to exit this page. You can use the same method to assign animals from a previously created session; see the section on Sessions in the Application Framework chapter.

Edit Image, Delete Image

See Common Procedures.

Print Barcode, Find Barcode

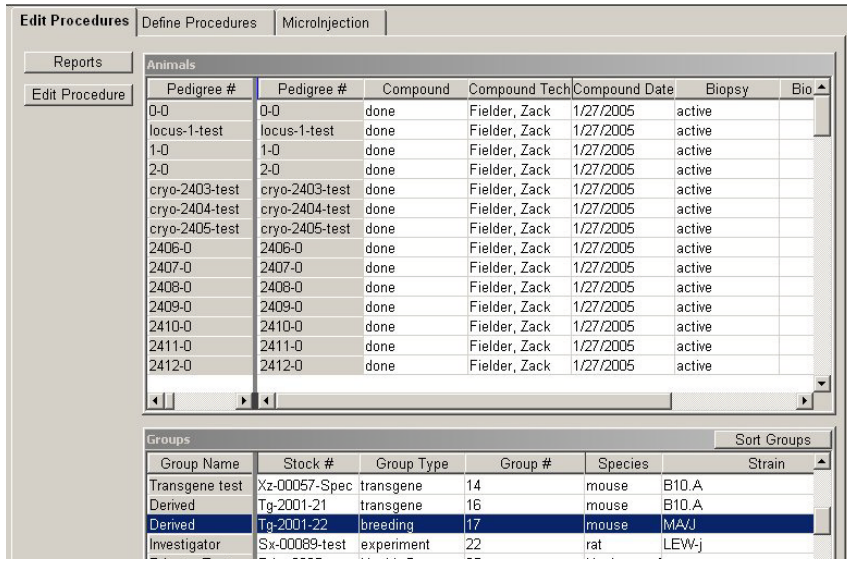
See section 9.4 for information on barcodes.

Notes

Notes

10. Procedure Manager

10.1 Edit Procedures

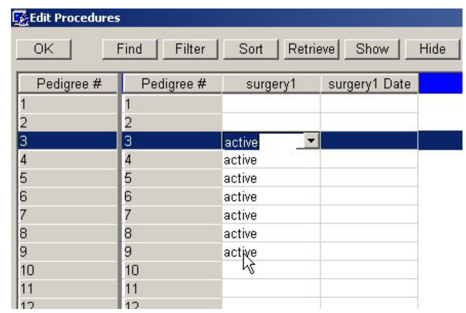


The Procedure Manager is similar to the Task Manager, but it allows you to associate procedures with specific animals as instead of just specific groups. This lets you better manage individual animals within a group. The Edit Procedures tab-page allows you to enter information on customized animal procedures for all animals in the currently selected group. Once you have created a new procedure for a group on the Define Procedures tab-page, every animal in that group will receive a record of the procedure that can be edited, as well as optional date and technician records for that procedure. You can set the procedure record to active, done, reused, or cancel.

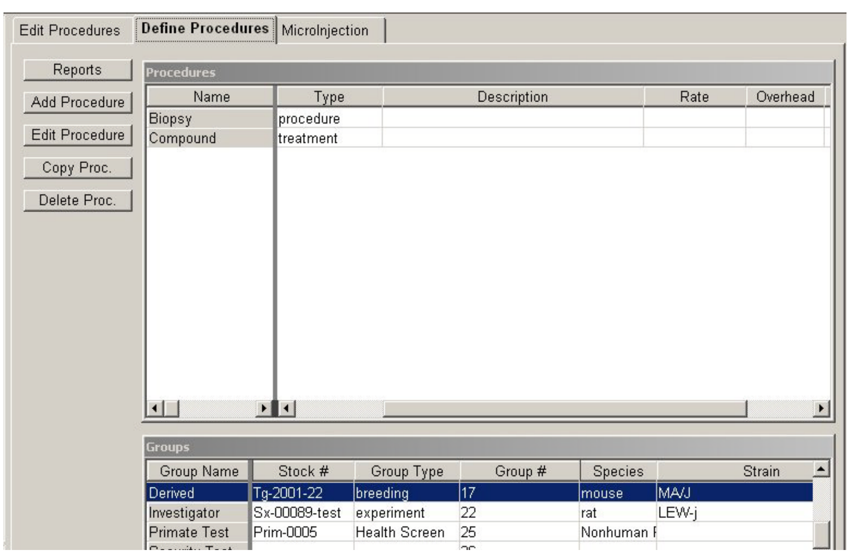
Reports

See Common Procedures.

Edit Procedure



Press Edit Procedure, or double-click on any of the animals to open a report-like form for procedure editing. This form provides the ability to make quick mass edits. For example, you can set the status of one animal procedure to active, click elsewhere on the edit form, and then drag the active status downwards to several animals. Once you mark the procedure as “done” for an animal and enter a date the procedure cost will be recorded in the Account Manager.

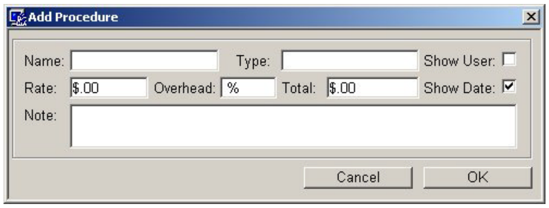


10.2 Define Procedures

Use the Define Procedures tab-page to create procedure types that will appear on the Edit Procedures tab-page. Procedure types are associated with the selected group when created, but can be copied over to other groups. Created procedures will be available to all animals in the selected group.

Reports, Edit Procedure, Delete Procedure

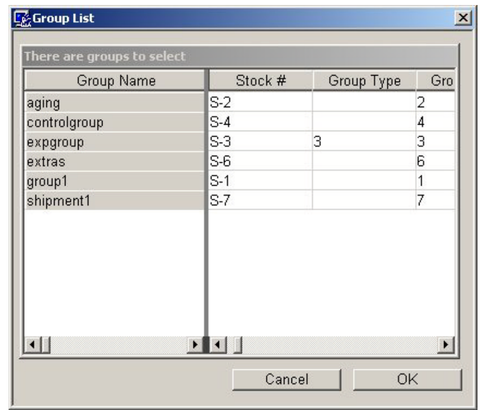
See Common Procedures.



Add Procedure

Select a group, then press Add Procedure to open a new window. Enter the desired information and press OK to save the new procedure type. Check the Show User checkbox to create a Technician field for the procedure. Check the Show Date checkbox to create a Date field for the procedure. These will appear when you go to the Edit Procedures tab-page. If you enter a cost, it will be used when you mark the procedure as “done” for animals on the Edit Procedures tab-page to calculate total cost in the Account Maanger.

Tip: Facility restricts you from creating procedures with the same name. These restrictions are not case sensitive - you can’t have both Surgery1 and surgery1 in a group.

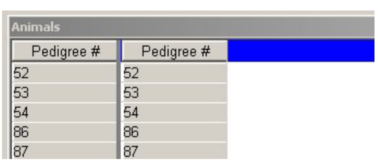


Copy Proc.

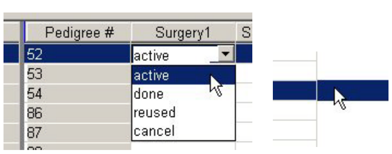
Copy procedures to another group by first selecting one or more of them in the Procedures window. Press the Copy Proc. button to open a group copy box, then select one or more groups to copy the selected procedure(s) to.

Tutorial: Defining and Editing a Procedure

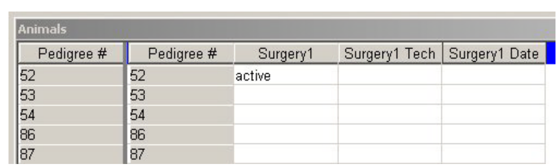
Assignment: You want to create a surgery procedure for animals in the group aging.



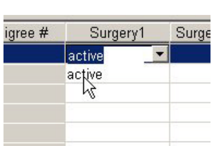
1. Go to the Define Procedures tab-page of the Procedure Manager.
2. Press the Add Procedure button, and set the procedure name to Surgery1.
3. Set the type to Procedure and check both the Show User checkbox and the Show Date checkbox. Press OK to create the procedure.
4. Go to the Edit Procedures tab-page, and press the Edit Procedures button.

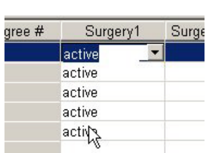


5. Click in the Surgery1 field for the first animal, and set the status to active.

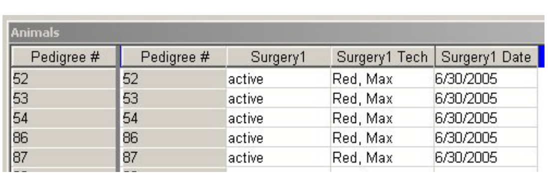


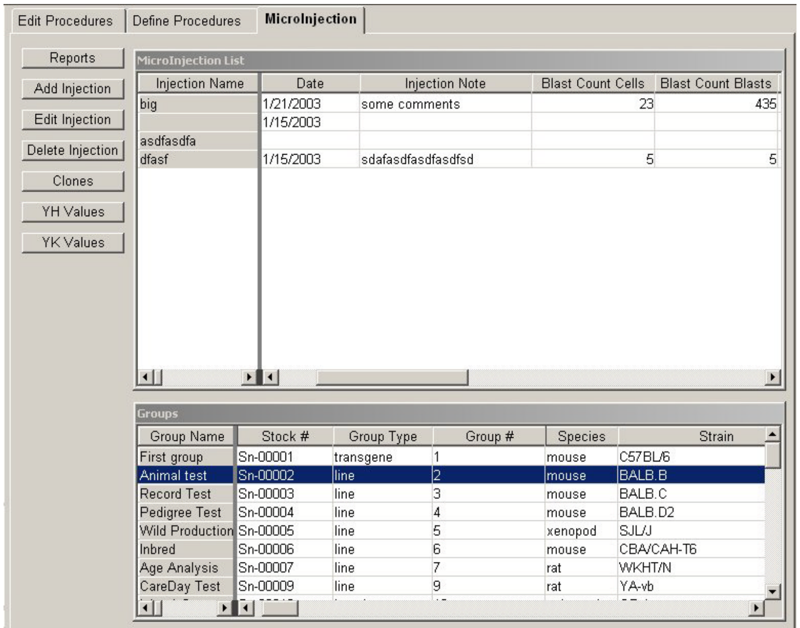
6. Click elsewhere on the page.





7. Put the mouse over the word “active,” hold down on the mouse button, and drag downwards for five animals. This will set the Surgery1 procedure for those animals to active.
8. Repeat the process to assign a technician and a date.
9. You can also make changes to the statistics for individual animals by clicking in their data fields.
10. Press OK to preserve your changes.





10.3 MicroInjection

The MicroInjection tab-page is used to specifically track microinjection procedures. This tab-page is customer specific; please refer to vendor if you have questions.

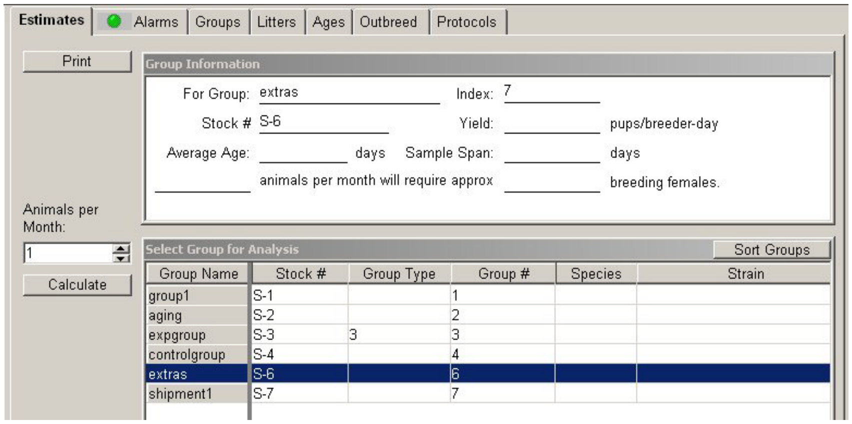
Notes

Notes

11. Advisor

11.1 Estimates

Use this tab-page to view breeding statistics and to estimate how many breeding females you will need to produce the number of animals necessary for your operations with a specific group. Estimates will show you the yield for the selected group in pups/breeder day, the average animal age, sample span, and the number of breeding animals required for the desired animals per month. Select a group then press Calculate to build an estimate sheet.



Print

See Common Procedures.

Animals per Month

Facility will estimate the number of breeders necessary to produce this number of animals per month. This number will appear in the "______ Animals per month" space.

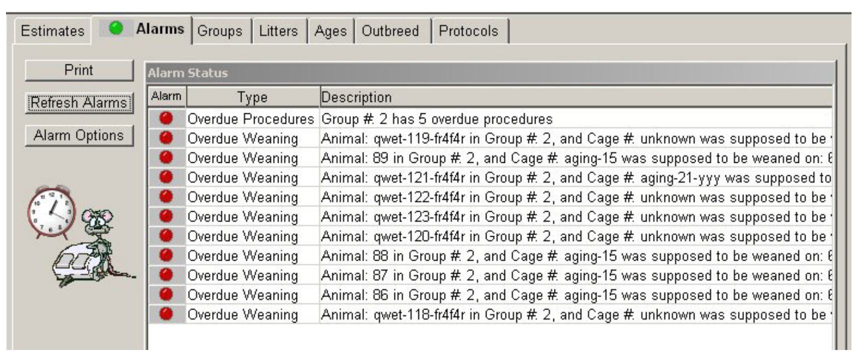
Calculate

Press Calculate to create an estimate sheet for the selected group. You must press this button every time you switch groups or change animals per month to get the estimate.

Tip: In order to calculate estimates, you must select a group containing both female animals and litters.

11.2 Alarms

The Alarms tab-page is a useful tool for keeping track of overdue tasks. Set the items for which you wish to receive alarms by using Alarm Options. Procedure and protocol alarms will show the group belonging to the procedure or protocol; weaning alarms will display which animals are past their wean date.



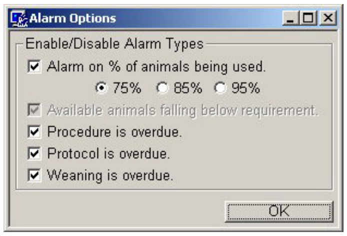
Tip: Alarms are not dependent on the current group. This tab-page shows alarms for all groups.

Print

See Common Procedures.

Refresh Alarms

Whenever you enter the Alarms tab-page or change alarm options, press Refresh Alarms to view a newly updated page.

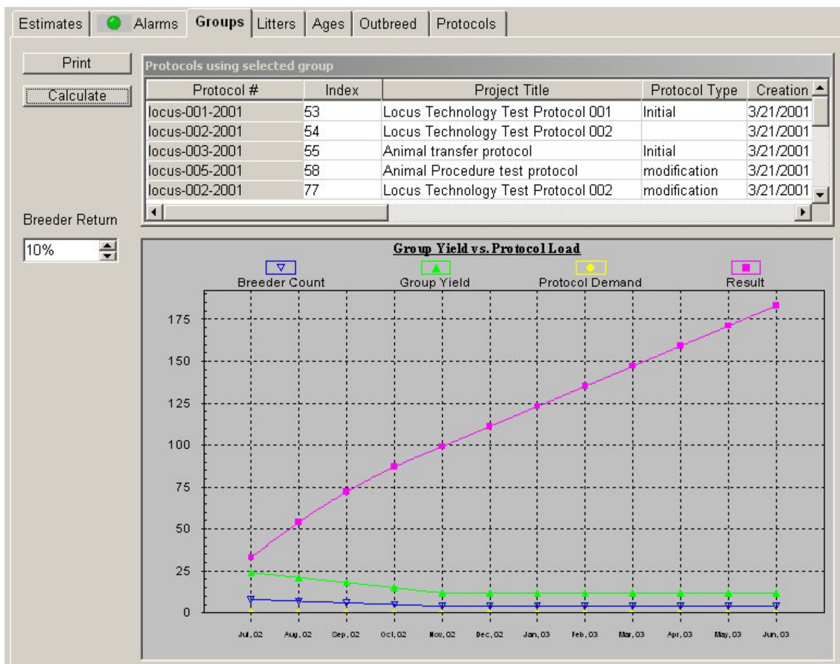


Alarm Options

Facility gives you the option to receive an alarm when 75%, 85%, or 95% of available animals are in use. By default, you will receive an alarm if you require the use of more animals than are in the system. You can also choose to be notified when the dates for procedures, protocols, or weaning have passed.

11.3 Groups

The Groups tab-page provides a visual representation of the information offered on the Estimates tab-page, extended over the next twelve months. To use this tab-page, select a group on the Estimates tab-page, specifiy a breeder return, and press Calculate. The blue line on the graph projects the number of breeders that will be in a group in a given month for the selected percentage of breeders you will return to breeding. This line is based on how many breeders you return and normal attrition. The green line shows the projected yield for the group (in pups per breeder day). The yellow line shows the predicted usage of animals by any protocols to which the group is attached (attached protocols show up in the top window of this tab-page). The pink line shows the result, that is the projected number of animals produced in the group with the specified breeder return. This data will help you to plan your colonies more efficiently for the number of animals you need to produce.



Print

See Common Procedures.

Calculate

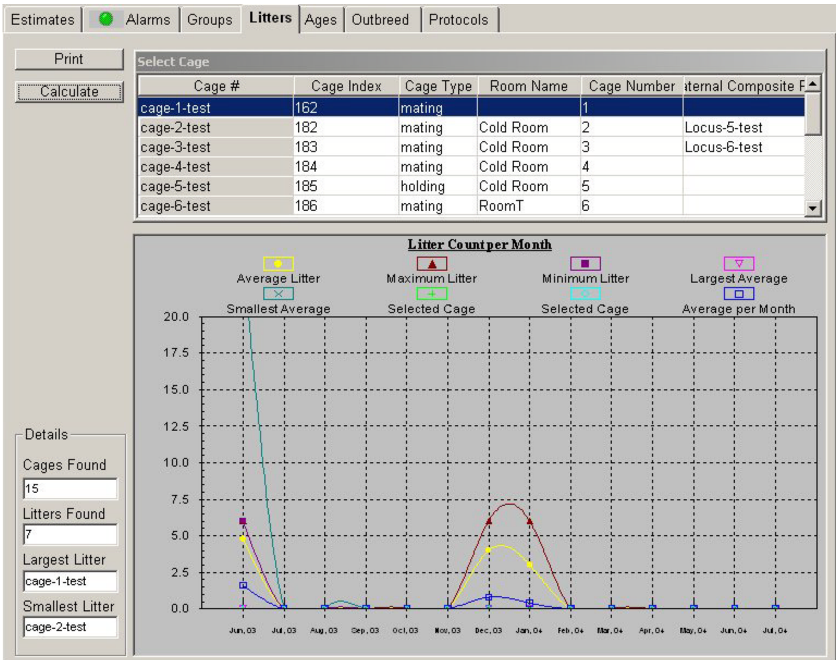
Press Calculate each time you change groups or adjust the breeder return amount in order to update the graph.

Breeder Return

This number represents the percentage of animals that are returned as breeders from one month to the next. Based on this amount, and the normal attrition rate of the group, Facility will project future group data.

11.4 Litters

The Litters tab-page shows you a visual representation of the breeding performance for the selected group. The litter history for the cage selected in the window at the top of the tab-page appears as a green line on the graph. The rest of the graph lines are explained in the legend above the graph. The actual recorded litter amounts are shown as triangles, squares, or circles on the graph depending on their key. Graph lines are extrapolated from these points. The graph is recorded over the history of the group existence.



Print

See Common Procedures.

Calculate

Press Calculate to display the graph results for the currently selected group and cage.

Details

Under Details there are fields in which you can record the number of cages and litters found and the cages with the largest and smallest litters in the selected group.

11.5 Ages

This tab-page creates a visual comparison between the actual age of the animals in the selected group and the ideal breeding age. The yellow bars display the current age distribution of female animals. The green bars display current age distribution of male animals. The blue bars display the historical age yied for the group. By comparing the yellow and green bars to the blue bars, you can see how the current generations of your group are performing compared to the history of performance. For example, if you notice that your females have the best breed yield between 40 days and 120 days, and most of your

females are older than 240 days, your colony is not performing at its peak.

Tip: Note that amounts are not absolute, but instead recorded in normalized %.

Print

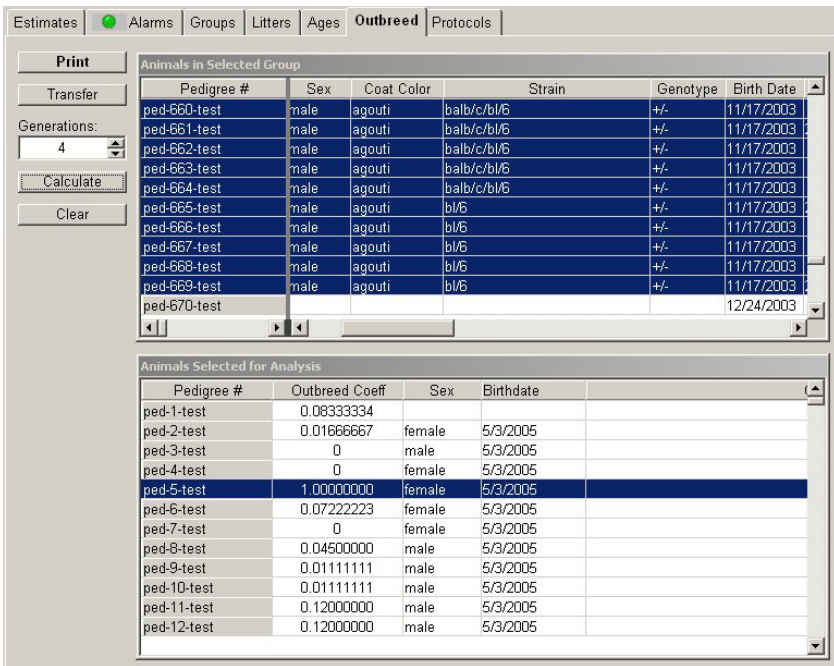
See Common Procedures.

Calculate

Press Calculate every time you change a group or manipulate group information in order to update this graph.

11.6 Outbreed

Use the Outbreed tab-page to calculate the outbreed coefficients for your groups. All current animals in the selected group are displayed in the top window. Use the Transfer button to move some of these animals to the Animals Selected for Analysis window, then select one animal from that list to calculate outbreed coefficients for. Press calculate to view your results. The selected animal will display the number "1.00000" as outbreed coefficient; all other animals will display a number that shows how closely related they are to the selected animal.



Print

See Common Procedures.

Transfer

Once you have selected the animals you want to calculate outbreed coefficients for, press Transfer to move them to the bottom window on this tab-page.

Generations

Enter how many generations back you want to calculate outbreed coefficients. Use the arrows on the side to increase or decrease this number, or enter a number manually. By default, Generations is set to “4.”

Tip: Use caution when increasing the number of generations, especially if you have a large number of animals. Your computer might not be able to handle the calculations.

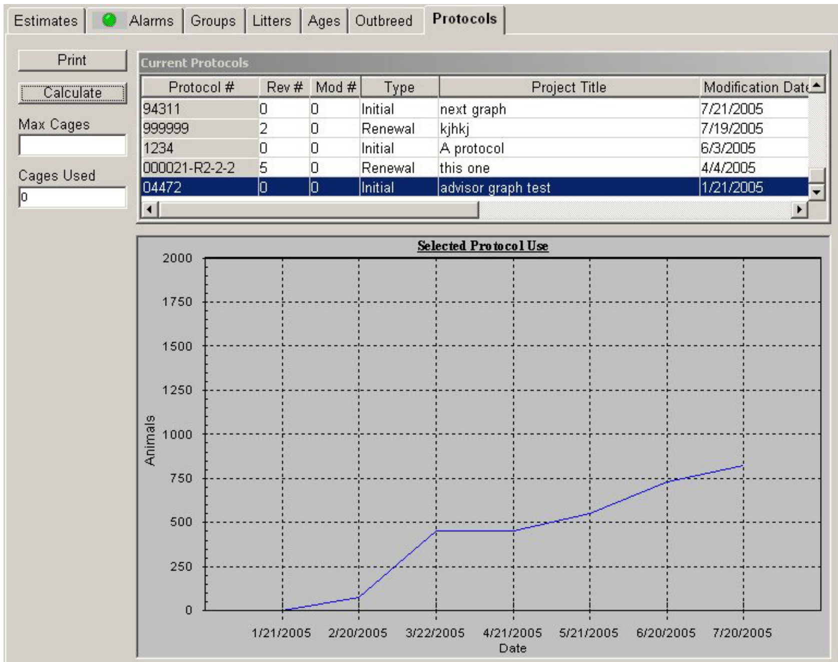
Calculate

Press Calculate to find out the outbreed coefficients for the Animals Selected for Analysis in relation to the currently selected animal in that window.

Clear

Use the Clear button to remove all animals from the Animals Selected for Analysis window.

11.7 Protocols



The Protocols tab-page shows you a historical graph of the animals that have been used for the protocol selected in the Current Protocols window. Amounts will appear here for the number of animals that have been used (according to your designation of “used” on the Group Mgr. tab-page of the Set Options window) in the groups associated with the protocol.

Tip: This tab-page requires real-time data to create a graph. For example, it will not work if you retroactively sacrifice animals or change their sacrifice date.

Print

See Common Procedures.

Calculate

Press Calculate to update results each time you switch graphs or change information related to the protocol.

Max Cages, Cages Used

Some facilities use these fields to keep track of information related to their protocols. Information entered here will not be preserved when you exit the Advisor.

Notes

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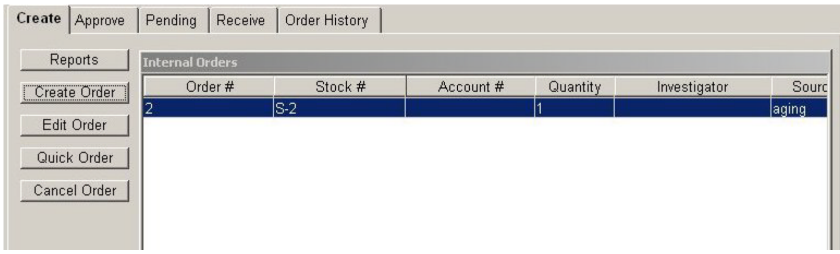
12. Internal Order Process

12.1 Create

Create internal orders to transfer animals between groups on this tab-page. This is a different process from using the Transfer button on the Animals in Group tab-page, for use when an order to move animals must be approved and verified. Orders created on this page can be edited or canceled. They will also appear on the Approve tab-page, from which you can move them through the approval system. Orders will appear as "new" in the Order History.

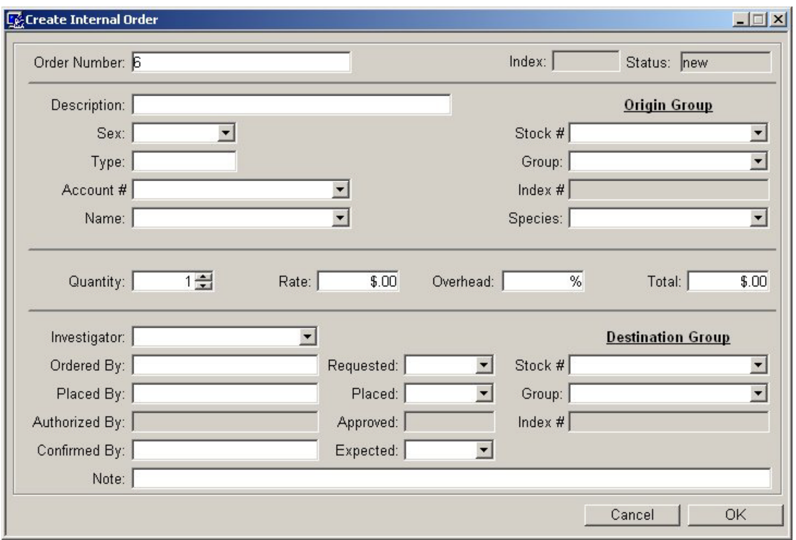


Reports, Edit Order

See Common Procedures.

Create Order

This is the form from which you will customize your internal animal order. Set the order number in the top of the window. Next down is the area to enter information about animals to transfer, such as sex and group. Make sure you choose a group with enough animals for the desired transfer amount. Under this is a space to enter PI and date information, as well as the destination group for your transfer. Total cost will be calculated automatically from quantity, rate, and overhead.



Tip: Make sure to enter information in addition to order number, or the order will not be saved.

Quick Order

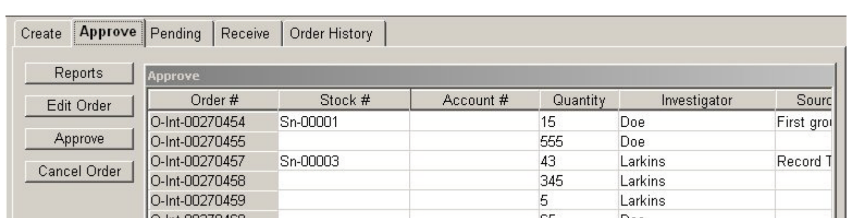
Quick Order provides a form similar to a Create Order form, except that Ordered By, Placed By, Authorized By, and Confirmed By (plus their attendant date fields) are automatically filled in with the name of the current user and the current date. Also, using Quick Order bypasses the approval and pending phases and goes straight to animal transfer. See section 12.4 for more information on transferring animals. Orders that have been quick-ordered appear as "transferred" on the Order History tab-page.

Cancel Order

Select an order, then press Cancel Order to permanently remove it from the Internal Orders and Approve lists. The order will appear on the Order History tab-page as "cancelled."

12.2 Approve

All orders created on the Create tab-page also appear on the Approve tab-



page. Once you approve an order, it will be removed from this tab-page and also from the Create tab-page.

Tip: You cannot approve an order if there is no destination group selected.

Reports, Edit Order

See Common Procedures.

Approve

Once an order has been created, you can select it and press Approve to move it to the Pending tab-page. You can also approve an order by double-clicking on it in the Approve window.

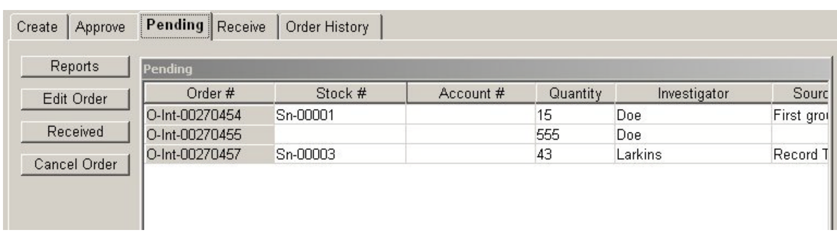
Cancel Order

See Section 12.1.

Tip: New to FACILITY version 6 are Edit buttons on the Approve, Pending, and Receive tab-pages.

12.3 Pending

Pending orders are those that have been received from the Approve tab-page. Once they are marked as Received they will be removed from this tab-page. Orders on this tab-page appear as "approved" on the Order History tab-page.



Reports, Edit Order

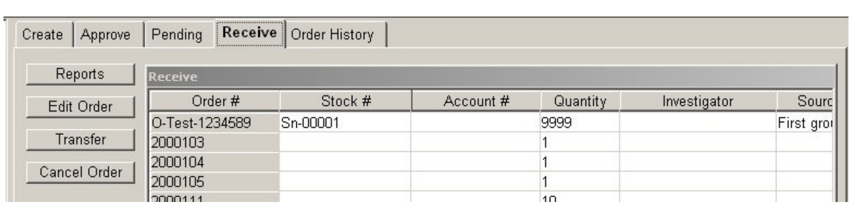
See Common Procedures.

Received

Select an order on the Pending tab-page, then press Received to move it to the Receive tab-page. You can also move an order to the Receive tab-page by double-clicking on it in the Pending window.

Cancel Order

See Section 12.1.



12.4 Receive

Received orders are those that have been sent from the Pending tab-page, and are ready to be fulfilled. Orders on this tab-page appear as “received” on the Order History tab-page; once you use the Transfer function, the order will appear as “transferred.” Note that during the transfer, you will not be able to select which animals in the selected group will be moved to a new group.

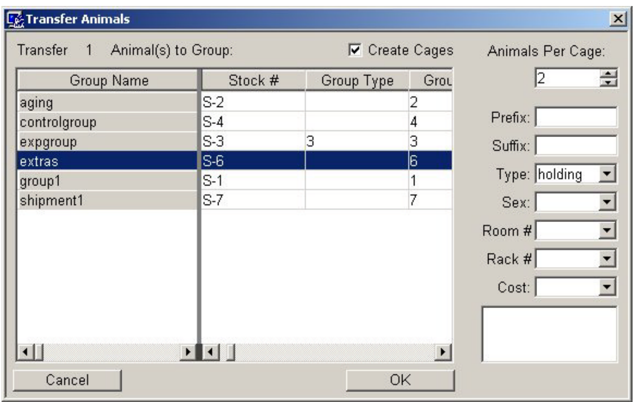
Tip: Although it is possible to change the group during the animal transfer, this negates the whole internal order process and is generally discouraged.

Reports, Edit Order

See Common Procedures.

Transfer

This transfer function works the same as Transfer on the Animals in Group tab-page of the Group Manager, except that the groups to transfer from and to and the number of animals are set up during the ordering process. Animals transferred in this way will need to be put into new cages, as cages stay in the groups to which they were originally assigned. You can set cage options on the right side of the transfer dialog window. You can also transfer animals by double-clicking on an order in the Receive window.



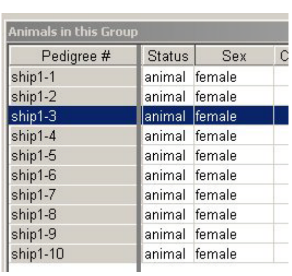
Tip: You will not be allowed to transfer the desired animals if there are not enough animals in the “transfer from” group.

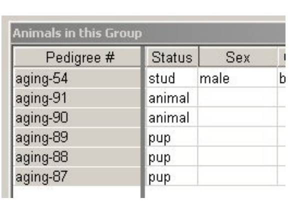
Cancel Order

See Section 12.1

Tip: You can’t choose which animals are transferred using this method. Gender choice from when you created the order will be preserved. If you chose “either” for gender, a random assortment of males, females, and ungendered animals will be transferred.

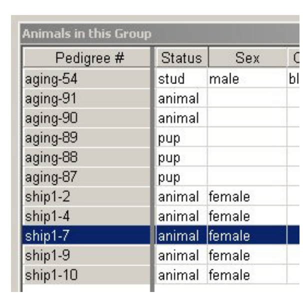
Tutorial: Create and Fulfill an Order





Assignment: As part of your aging experiment, you wish to make an internal order between the aging and shipment1 groups for 5 animals.

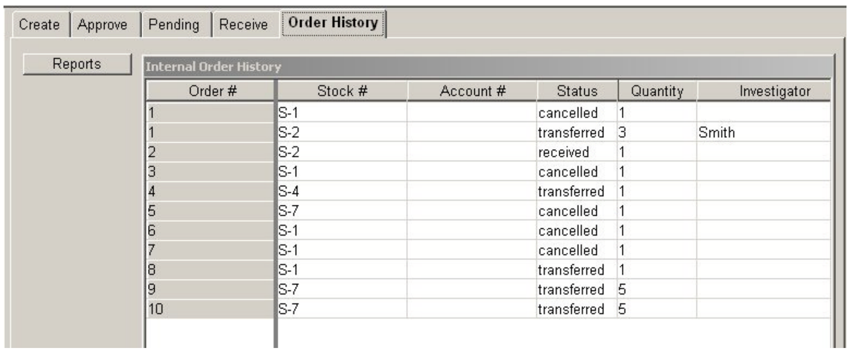
1. Press Create Order on the Create tab-page of the Internal Order Process window.
2. Set the origin group to shipment1, and the destination group to aging.
3. Enter any additional desired information, and press OK to create the order.
4. Go to the Approve tab-page and select your newly created order.
5. Press the Approve button to send the order to the Pending tab-page.



6. Go to the Pending tab-page and select your newly approved order.
7. Press the Received button to send the order to the Received tab-page.
8. Go to the Receive tab-page and select your newly received order.
9. Press the Transfer button to open a new transfer dialog box.
10. Review your transfer settings, and set cage options for your new animals.
11. Press OK to transfer the animals and assess requisite charges.
12. Check in the Group Manager to make

12.5 Order History

The Order History keeps track of all actions performed in the Internal Order Process manager. Newly created orders are marked “new;” orders on the Pending tab-page are marked “approved;” orders on the Receive tab-page are marked “received;” and orders that are completed from the Receive tab-page using the Transfer button are marked as “transferred.” Orders cancelled at any point during this process are marked as “cancelled.”



Order #	Stock #	Account #	Status	Quantity	Investigator
1	S-1		cancelled	1	
1	S-2		transferred	3	Smith
2	S-2		received	1	
3	S-1		cancelled	1	
4	S-4		transferred	1	
5	S-7		cancelled	1	
6	S-1		cancelled	1	
7	S-1		cancelled	1	
8	S-1		transferred	1	
9	S-7		transferred	5	
10	S-7		transferred	5	

Reports

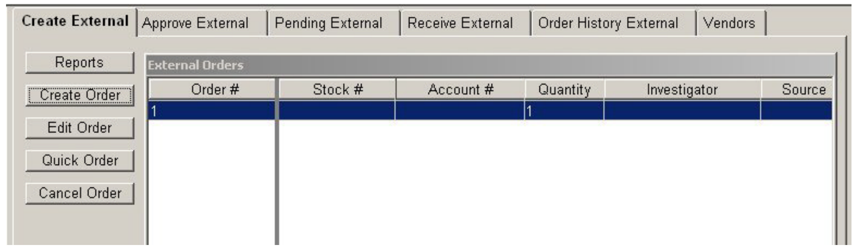
See Common Procedures.

Notes

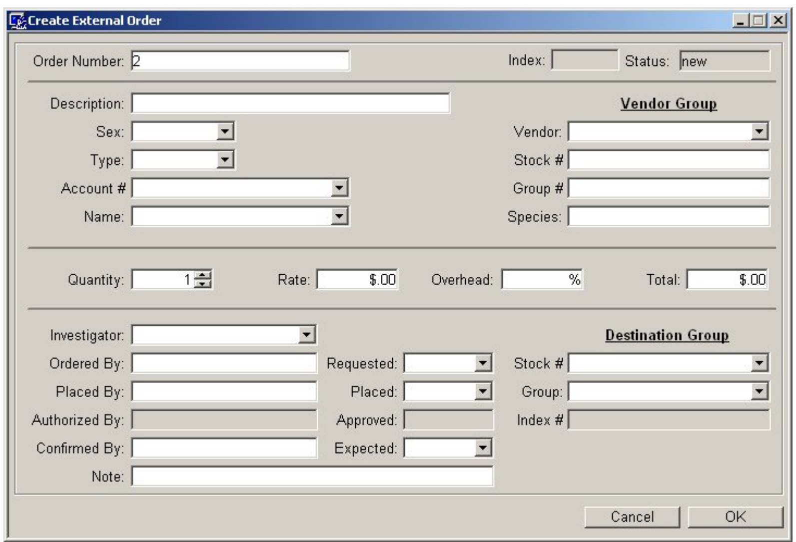
13. External Order Process

13. External Order Process

13.1 Create External



Create external orders to enter animals into the system from an external source on this tab-page. This is a different process from using the Add Animals button on the Animals in Group tab-page, for use when you want to keep track of the source and cost of received animals. Orders created on this page can be edited or canceled. They will also appear on the Approve External tab-page, from which you can move them through the approval system. Orders will appear as “new” in the Order History External.



Tip: Make sure to enter information in addition to order number when creating an external order, or the order will not be saved.

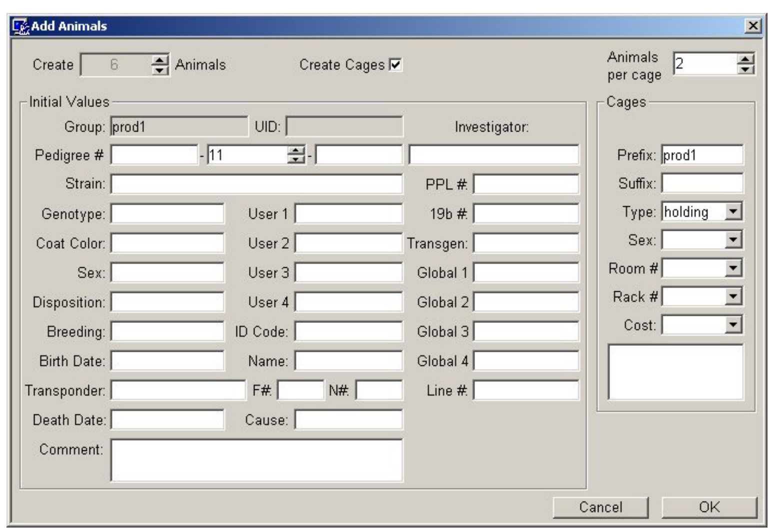
Reports, Edit Order

See Common Procedures.

Create Order

This is the form from which you will customize your external animal order. Set the order number in the top of the window. Next down is the area to enter information about animals to transfer, such as sex and type. Also enter vendor information related to the order in this area Under this is a space to enter PI and date information, as well as the destination group for your external order. Total cost will be calculated automatically from quantity, rate, and overhead.

Tip: Use the Vendors tab-page to populate the vendors drop-down list.



Quick Order

Quick Order provides a form similar to a Create Order form, except that using Quick Order bypasses the approval and pending phases and goes straight to animal transfer. Also, Ordered By, Placed By, Authorized By, and Confirmed By (plus their attendant date fields) are automatically filled in with the name of the current user and the current date.

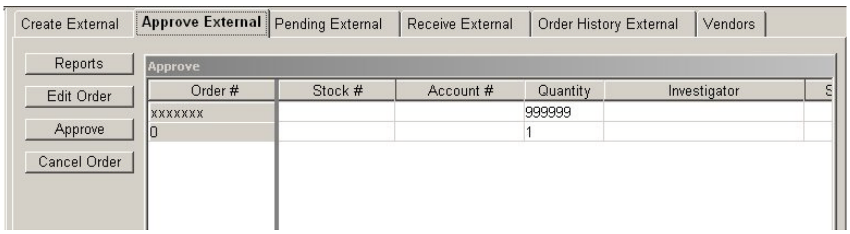
See section 13.4 for more information on transferring animals. Orders that have been quick ordered appear as “transferred” on the Order History External tab-page.

Cancel Order

Select an order, then press Cancel Order to permanently remove it from the Create External and Approve lists. The order will appear on the Order History External tab-page as “cancelled.”

13.2 Approve External

All orders created on the Create External tab-page also appear on the Approve External tab-page. Once you approve an order, it will be removed from this tab-page and also from the Create External tab-page.



Tip: You cannot approve an order if there is no destination group selected.

Reports, Edit Order

See Common Procedures.

Approve

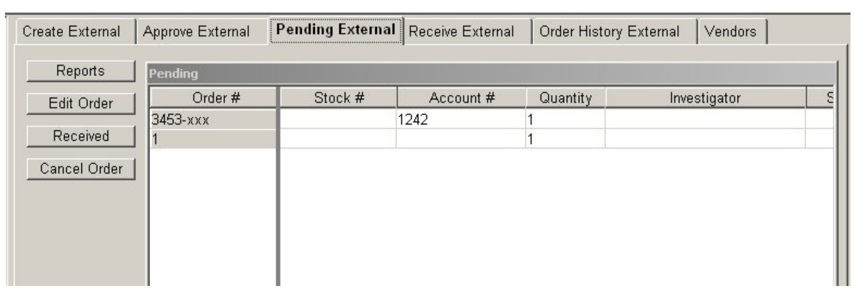
Once an order has been created, you can select it and press Approve to move it to the Pending tab-page. You can also approve an order by double-clicking on it in the Approve window.

Cancel Order

See Section 13.1.

Tip: New to FACILITY version 6 are Edit buttons on the Approve External, Pending External, and Receive External tab-pages.

13.3 Pending External



Pending orders are those that have been received from the Approve External tab-page. Once they are marked as Received they will be removed from this tab-page. Orders on this tab-page appear as “approved” on the Order History External tab-page.

Reports, Edit Order

See Common Procedures.

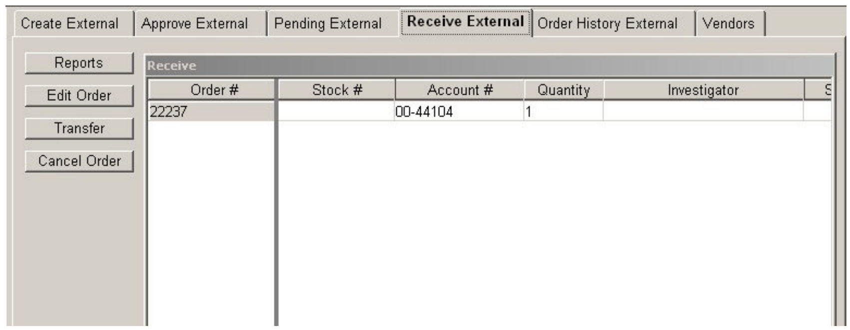
Received

Select an order on the Pending External tab-page, then press Received to move it to the Receive External tab-page. You can also move an order to the Receive External tab-page by double-clicking on it in the Pending window.

Cancel Order

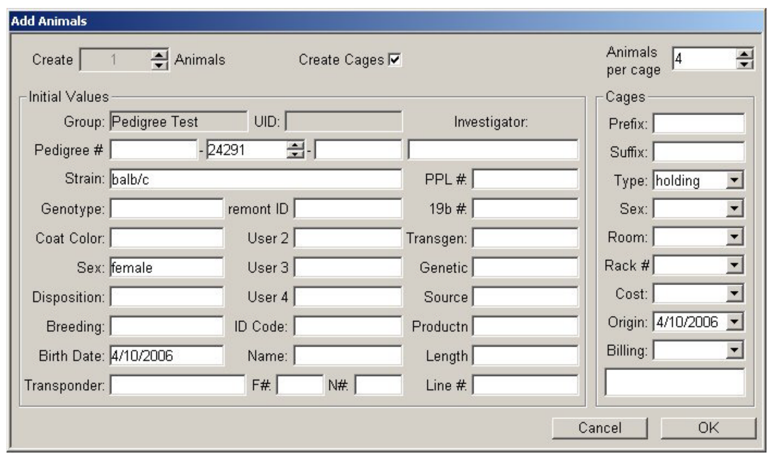
See Section 13.1.

13.4 Receive External



Received orders are those that have been sent from the Pending External tab-page, and are ready to be fulfilled. Orders on this tab-page appear as "received" on the Order History tab-page; once you use the Transfer function, the order will appear as "transferred."

Tip: Although it is possible to change the group during the animal transfer, this can cause problems when tracking order history.



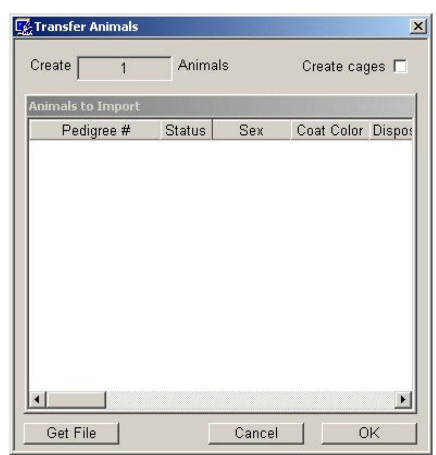
Reports, Edit Order

See Common Procedures.

Transfer

This transfer function works the same as Transfer on the Animals in Group tab-page of the Group Manager, except the group to transfer to and the number of animals have been predetermined. You can place transferred animals into cages when you create the animal record (use the functions on the right side of the Add Animals window), or you can wait and use the Assign tab-page of the Cage Manager.

Transfer with EAnimals



If you opted to use EAnimals instead of Animals when you created your order (in the Type field, under Sex), you will get a different window to transfer animals. Instead of creating new animals in your system based on the transfer form (as seen on the previous page), Facility will create new animals based on the EAnimals text file that is sent to you. Press Get

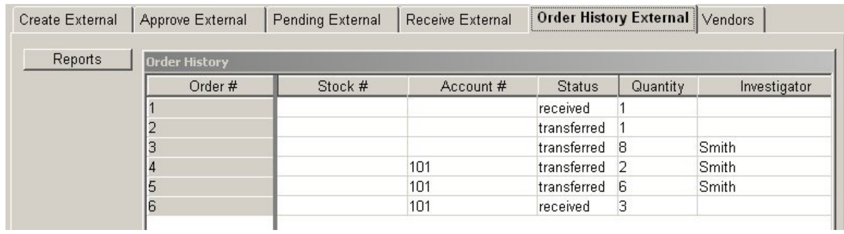
File to retrieve your new animal information, then press OK to save the transfer.

Cancel Order

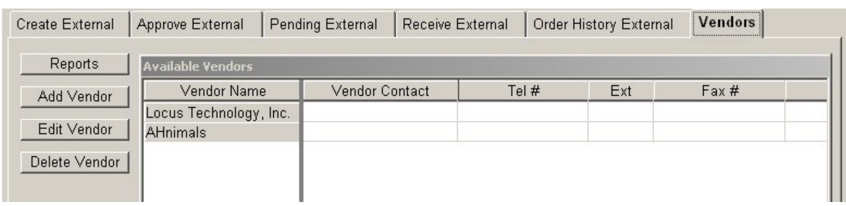
See Section 13.1

Tip: You can't choose which animals are transferred using this method. Gender choice from when you created the order will be preserved; if you chose "either" for gender, a random assortment of males, females, and ungendered animals will be transferred.

13.5 Order History External



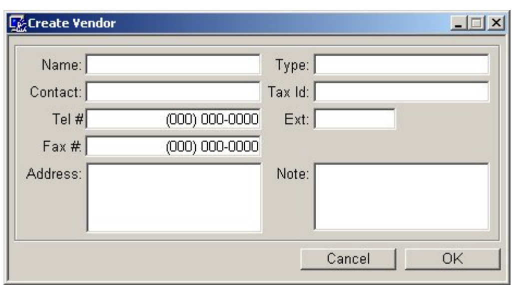
The Order History External tab-page keeps track of all actions performed in the External Order Process manager. Newly created orders are marked "new;" orders on the Pending tab-page are marked "approved;" orders on the Receive tab-page are marked "received;" and orders that are completed from the Receive tab-page using the Transfer button, or from the Create External tab-page using the Quick Order button are marked as "transferred." Orders cancelled at any point during this process are marked as "cancelled."



Reports

See Common Procedures.

13.6 Vendors



Keep track of vendors along with your animal orders by using the Vendor tab-page. You can create a list of vendors on this tab-page that will appear whenever you create a new order on the Create External tab-page.

Reports, Edit Vendor, Delete Vendor

See Common Procedures.

Add Vendor

Press the Add Vendor to open a new Create Vendor window. You can enter vendor contact information for quick reference, and a short note decribing the vendor.

Notes

14. Shipping Manager

14.1 Create Shipment

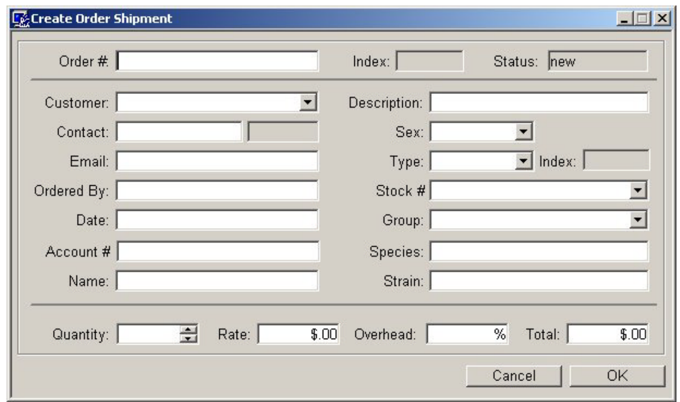
Creating shipment in Facility is similar to creating orders, only you are sending animals as opposed to receiving them. Also, the shipping procedure does not involve as many steps as the ordering procedure Use this tab-page to create shipments for you to approve and send out. Shipments on this page appear as "new" in Shipment History.

Tip: Make sure you include the group name and quantity when you create a shipment; otherwise, you won't be able to transfer animals properly.

Reports, Edit

See Common Procedures.

Create



Press the Create button to open a new Create Order Shipment window. An Order # will not be automatically created; you must use your own numbering system. Populate the Customers drop-down list on the Customers tab-page. Stock #, Group, Species, and Strain all describe the animal group to transfer from (select group using the drop-down list in any of these fields). Account Name items can be added in the Account Manager. Total cost will be calculated automatically from quantity, rate, and overhead.

Tip: Use the Customers tab-page to populate the drop-down list of customers.

Quick Ship

The Quick Ship function allows you to skip the approval phase. The Ordered By and Date fields will automatically be filled in with the current user and the current date. Once you press OK, you will be taken automatically to the Transfer Shipment page. See section 14.3 for more information on shipping animals.

Cancel

Shipments remain in Shipment History when they are cancelled, but cannot be revived or edited.

14.2 Approve Shipment

Shipment orders placed on the Create Shipment tab-page will automatically appear on the Approve Shipment tab-page. From here, you can verify the accuracy of your orders, and send them to the Ship tab-page to prepare for the animal transfer.

Reports

See Common Procedures.

Approve

Select a shipment, then press Approve to send it to the Ship tab-page.

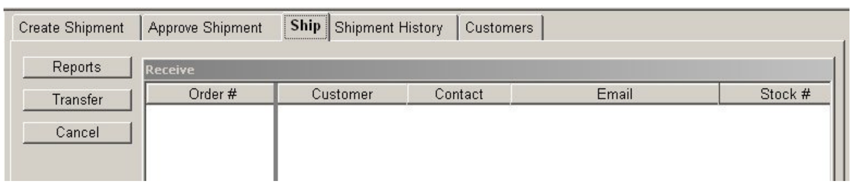
Cancel

See Section 14.1.

Tip: There are no Edit buttons on the Approve Shipment or Ship tab-pages. Make sure your shipment is correct before you approve it!

14.3 Ship

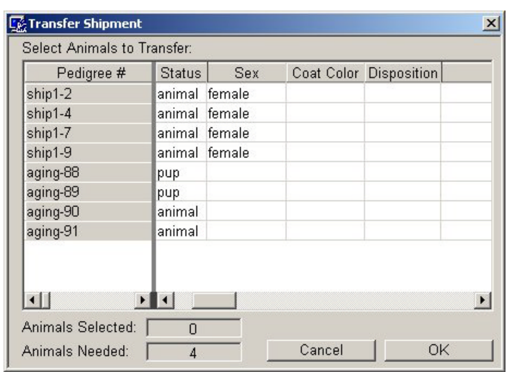
Once shipment orders have been approved, they will disappear from the Create and Approve Shipment tab-pages and appear on the Ship tab-page. On this tab-page you can record the transfer of animals from the selected group to the outside customer shown on the shipment form. Shipments on this page appear as “approved” in Shipment History.



Tip: Although it is possible to change the group during the animal transfer, can cause problems when tracking shipment history.

Reports

See Common Procedures.



Transfer

Select a shipment, then press Transfer to open the transfer dialog box. This window will show you all animals in the selected group. Match the Animals Selected count to the Animals Needed count by selecting the desired animals to transfer (see Common Procedures for selecting multiple items.) When you press OK, the selected animals will automatically be removed from their group and the shipment will be moved to Shipment History.

Tip: Facility will not warn you if you change order options during the transfer phase - for example, if the order was for male animals and you enter females. Double-check your accuracy before you press OK.

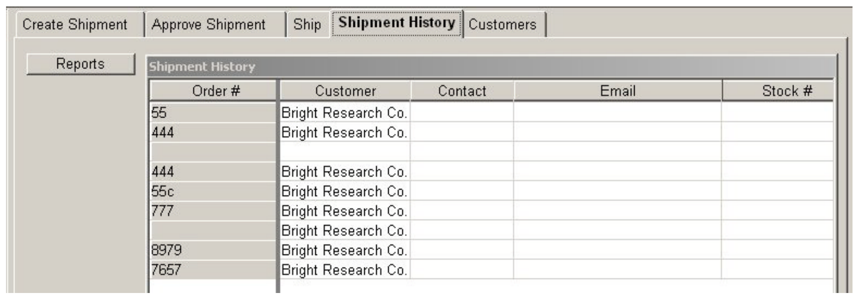
Cancel

See Section 14.1.

Tip: You can't choose which animals are transferred using this method. Gender choice from when you created the order will be preserved; if you chose "either" for gender, a random assortment of males, females, and ungendered animals will be transferred.

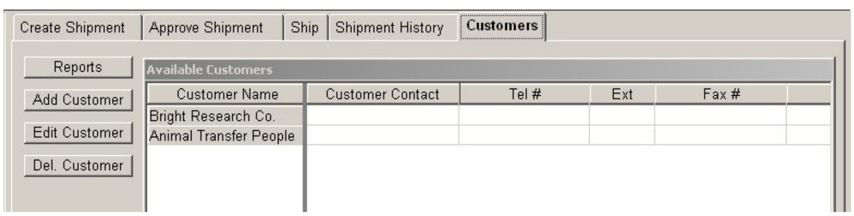
14.4 Shipment History

Double-click on an item in the Shipment History to view the its shipment form. Use the slider bar to view shipment order status: orders on the Create and Approve Shipment tab-pages appear as "new;" orders on the Ship tab-page appear as "approved;" quick-shipped orders and orders completed from the Ship tab-page appear as "transferred;" and orders cancelled at any point during the process appear as "cancelled."



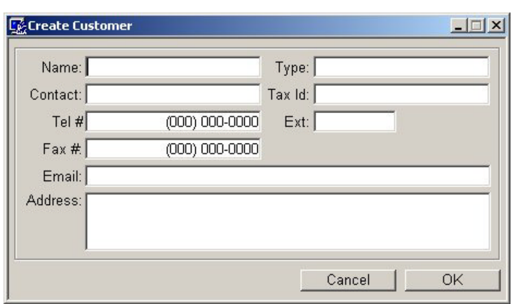
Reports

See Common Procedures.



14.5 Customers

Use the Customers tab-page to set the name and contact information for people and organizations you wish to ship to. Entries on this tab-page will populate the Customers drop-down list for when you create a shipment order.

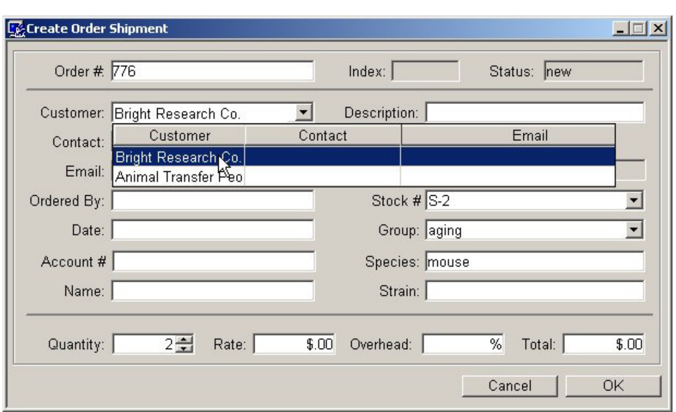


Reports, Edit Customer, Del. Customer.

See Common Procedures.

Add Customer

Enter the name and contact information for your shipment customer into the provided fields. Press OK to create the customer record.



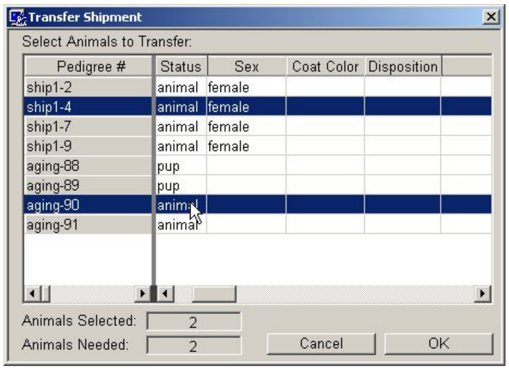
Tutorial: Create and Fulfill an Animal Shipment

Assignment: You want to ship 2 animals from your "aging" group to Bright Research Co.

1. Go to the Customers tab-page of the Shipment Manager.
2. Press Add Customer. Enter the name Bright Research

Co. and any other desired information.

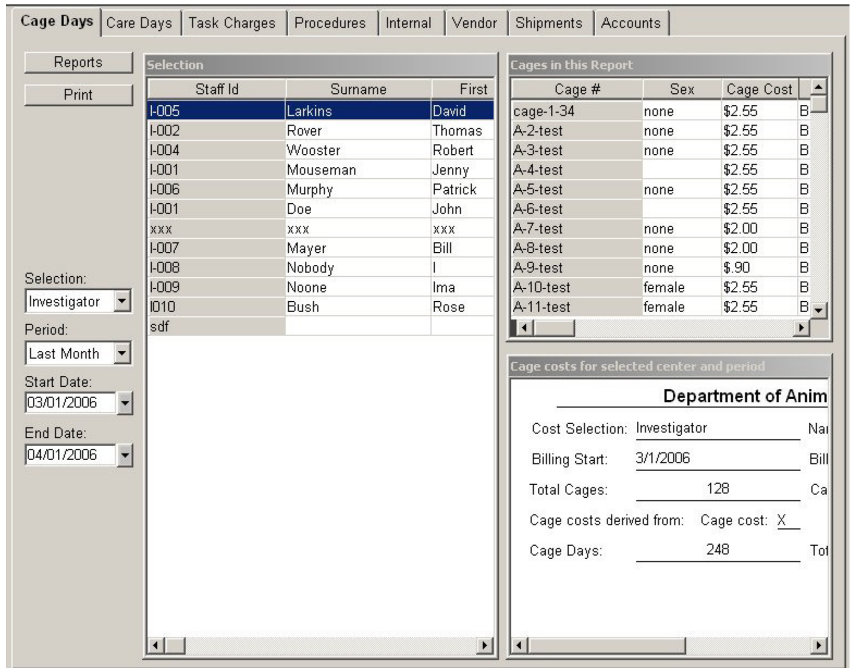
3. Press OK to create the customer record, then go to the Create Shipment tab-page.
4. Click on the Create button to start a new shipment record.
5. Enter a shipment order number. Set the customer to Bright Research Co. Choose the group aging, and set quantity to two animals. Enter any other pertinent data and press OK to create the shipment order.
7. Your shipment order has been approved. Go to the Approve tab-page, select your order and press the Approve button.
8. Your shipment is ready to be transferred. Go to the Ship tab-page, select your order and press the Transfer button.
9. Click on an animal, hold down Ctrl, and click on another animal to select two animals for transfer.
10. Press OK to complete the animal transfer to Bright Research Co.



Notes

15. Account Manager

15.1 Cage Days



The Cage Days tab-page will show you a list of groups, investigators, protocols, rooms, accounts, or facilities in the Selection window (depending what type of view you choose to see). The window in the upper right corner will display a list of cages belonging to the item(s) selected in the Selection window. The window in the lower right corner will display a cage cost form for each item selected in the Selection window; use the scroll bars on this window to view the various forms. Cage days is equal to the number of cages multiplied by the average age of cages in the group. Sample span is the number of days specified in the period selector. Total cost is the cost for all selected cages. Cage costs are applied in several ways: you can submit a cage cost when you create a cage, you can assign a cage to a room in which all cage costs are the same, or you can set a default cage cost on the Defaults tab of the Options menu.

Tip: See Common Procedures for information on selecting multiple items.

Reports, Print

See Common Procedures.

Selection

Use this drop-down list to choose the Selection view. You can choose to see cage days by group, investigator, protocol, room, account, or facility.

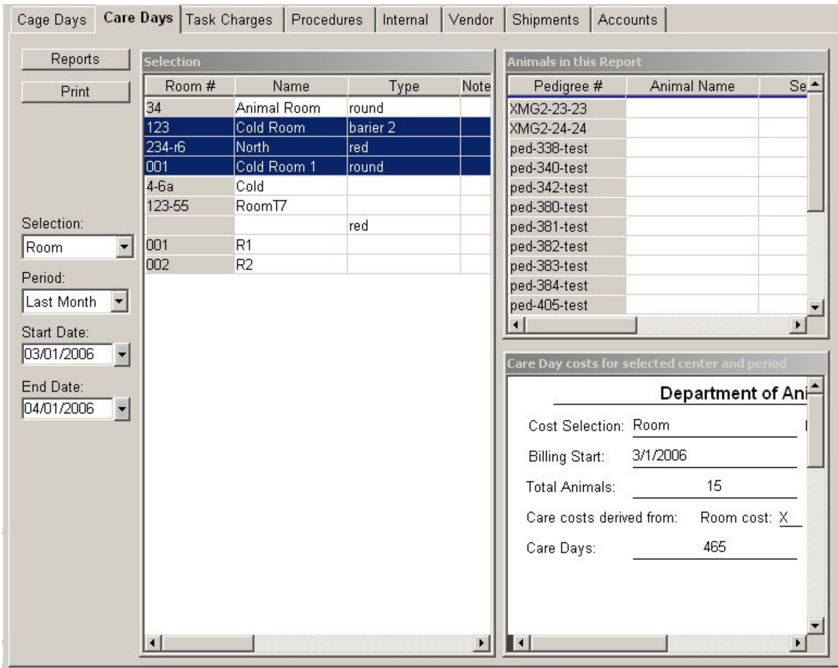
Filtering

Set a filter period of This Week, Last Week, This Month, Last Month, By Date(s) or All to view the statistics for that time period. If you choose By Date(s) use the drop-down calendars to set the period you wish to view. Otherwise, you don’t need to use those fields.

Tip: By default, the filter is set to show information for “Last Month.”

15.2 Care Days

The Care Days tab-page will show you a list of groups, investigators, protocols, rooms, accounts, or facilities in the Selection window (depending what type of view you choose to see). The window in the upper right corner will display animals belonging to the item(s) selected in the Selection window. The window in the lower right corner will display a care day cost form for each item selected in the Selection window; use the scroll bars on this window to view the various forms. The “Care Days” field is equal to the number of animals multiplied by the average age of animals in the group. There will be a check mark to signify whether care costs are derived from “Room cost” or “Default cost.” Animal care costs are calculated based on the total amount it costs to take care of your animals.



Reports, Print

See Common Procedures.

Selection

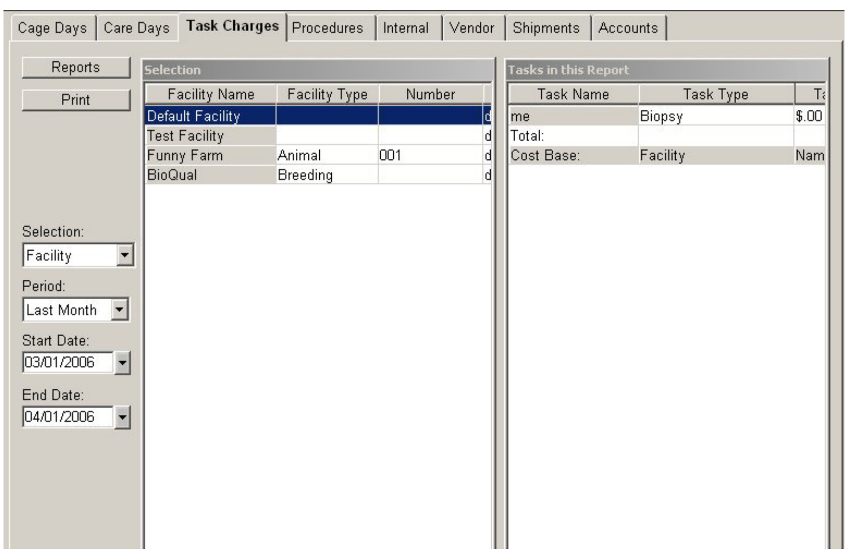
Use this drop-down list to choose the Selection view. You can choose to see cage days by group, investigator, protocol, room, account, or facility.

Filtering

See section 15.1 for information on filtering.

15.3 Task Charges

The Task Charges tab-page will show you a list of all completed tasks in the selected account or facility, or that are associated with the selected investigator. Task cost is calculated from the values you entered when you defined and created the task in the Task Manager. At the bottom of the list of tasks are two additional rows, a Total row and a Cost Base row.



Reports, Print

See Common Procedures.

Selection

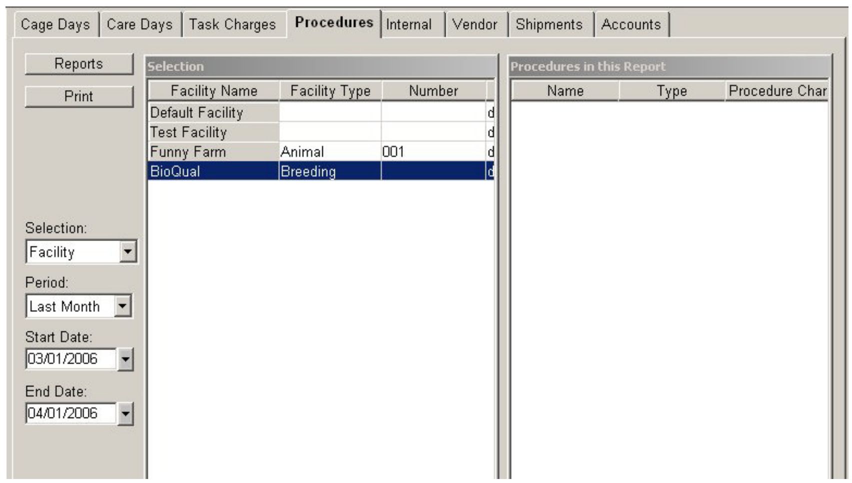
Use this drop-down list to choose the Selection view. You can choose to see task charges by investigator, account, or facility.

Filtering

See section 15.1 for information on Selection and Filtering.

15.4 Procedures

The Procedures tab-page will show you all procedures associated with the selected group or facility. You can decide what cost a particular procedure will have when you define it in the Procedure Manager. Items will appear on the Procedures tab-page if they have been marked as "done" for animals in the Procedure Manager. The Count field in this window shows how many animals have had the procedure performed.At the bottom of the list of procedures is a Procedure Total row.



Reports, Print

See Common Procedures.

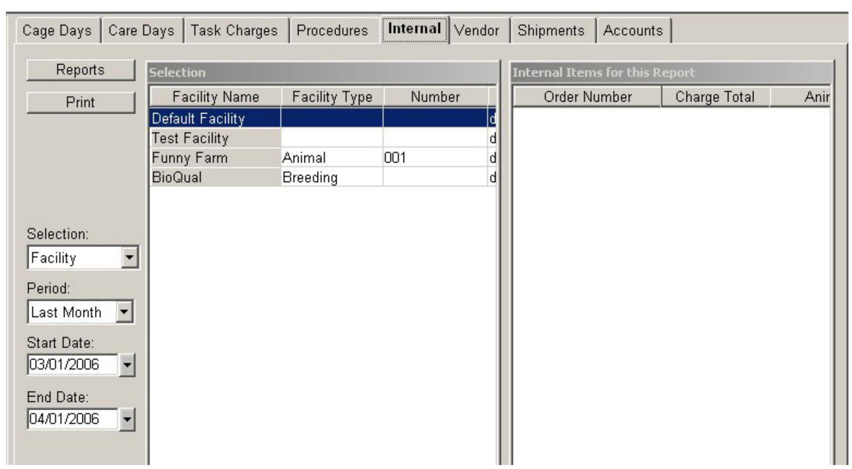
Selection

Use this drop-down list to choose the Selection view. You can choose to see procedure charges by group or facility.

Filtering

See section 15.1 for information on filtering.

15.5 Internal



The Internal tab-page will show you a list of all internal orders for the selected protocol or facility, or that are associated with the selected investigator (depending on Selection). At the bottom of the list of internal orders is an Internal Total row.

Tip: Items will appear once they are sent to the Receive tab-page of the Internal Order Process manager.

Reports, Print

See Common Procedures.

Selection

Use this drop-down list to choose the Selection view. You can choose to see internal orders by protocol, investigator or facility.

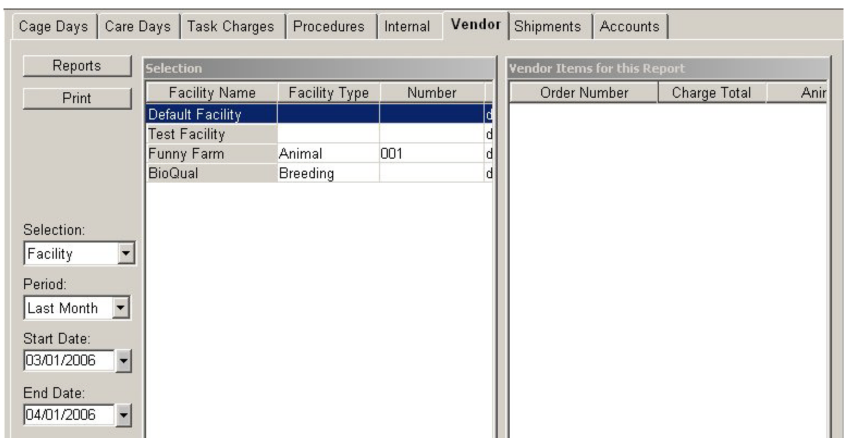
Filtering

See section 15.1 for information on filtering.

Tip: Entries will only be made in the Account Manager if you entered a cost when creating the order.

15.6 Vendor

The Vendor tab-page will show you a list of all external orders for the selected protocol or facility, or that are associated with the selected investigator (depending on Selection). Costs are calculated from those entered when you created the order. At the bottom of the list of external orders is an External Total row.



Reports, Print

See Common Procedures.

Selection

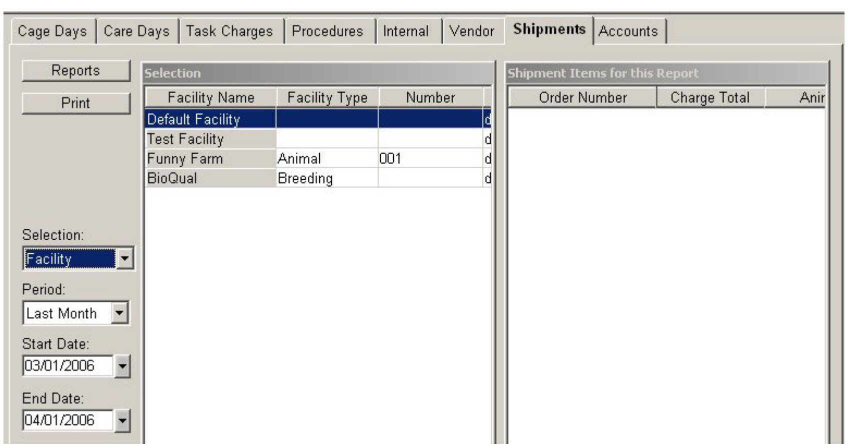
Use this drop-down list to choose the Selection view. You can choose to see external orders by protocol, investigator or facility.

Filtering

See section 15.1 for information on filtering.

15.7 Shipments

The Shipments tab-page will show you a list of all shipments from the selected protocol or facility, or that are associated with the selected investigator (depending on Selection). Costs are calculated from those entered when you created the shipment. At the



bottom of the list of shipments is a Shipment Total row.

Tip: Items will appear once they are sent to the Receive External tab-page of the External Order Process manager.

Reports, Print

See Common Procedures.

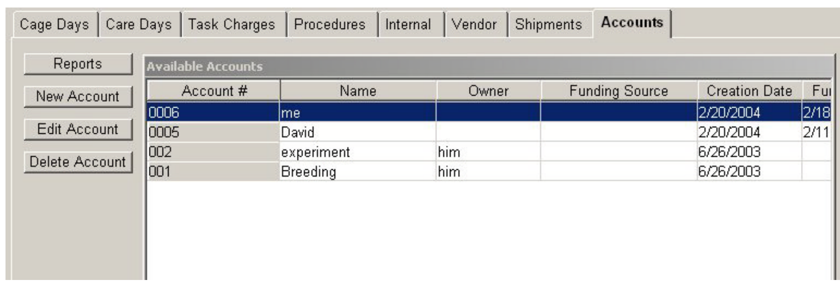
Selection

Use this drop-down list to choose the Selection view. You can choose to see shipments by protocol, investigator or facility.

Filtering

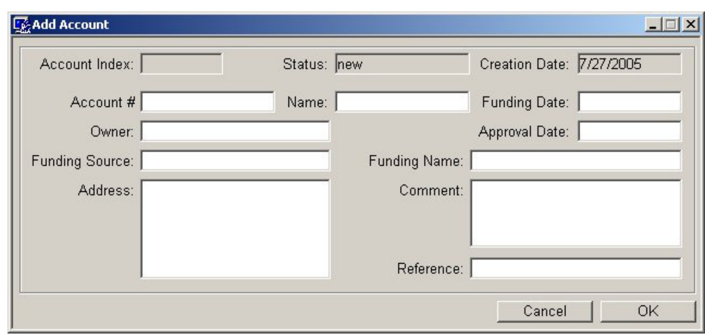
See section 15.1 for information on filtering.

15.8 Accounts



Use the Account Manager as a way to categorize where the charges for the groups or tasks will go. Accounts created in the Account Manager will populate the Account drop-down lists provided throughout FACILITY.

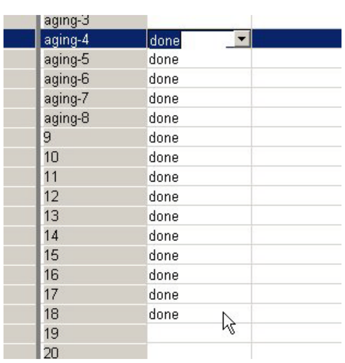
Reports, Edit Account, Delete Account



See Common Procedures.

New Account

Press New Account to open a window for creating a new account record. Enter Account #, Owner, and any other desired information. Press OK to save your changes.



Tutorial: Viewing Costs in the Account Manager

Assignment: You want to view the costs for procedures you have performed on animals in your "aging" group.

1. Go to the Procedure Manager and select the group "aging."
2. If you have not already, define procedures on the Define Procedures tab-page.
3. Press Edit Procedures on the Edit Procedures tab-page.
4. Set the status for the procedure to "done" for some of the animals, and enter

Procedures in this Report

Name	Type	Procedure Charge	Count	Total Charge
proced1		$5.15	15	$77.25
proced2		$6.36	9	$57.24
Total:				$134.49

#	Pedigree #	proced1	proced1 Date	proced2	proced2 Date
	aging-1				
	aging-2				
	aging-3				
	aging-4	done	7/27/2005	done	7/27/2005
	aging-5	done	7/27/2005	done	7/27/2005
	aging-6	done	7/27/2005	done	7/27/2005
	aging-7	done	7/27/2005	done	7/27/2005
	aging-8	done	7/27/2005	done	7/27/2005
	9	done	7/27/2005	done	7/27/2005
	10	done	7/27/2005	done	7/27/2005
	11	done	7/27/2005	done	7/27/2005
	12	done	7/27/2005	done	7/27/2005
	13	done	7/27/2005		
	14	done	7/27/2005		
	15	done	7/27/2005		
	16	done	7/27/2005		
	17	done	7/27/2005		
	18	done	7/27/2005		

dates.

Tip: The Account Manager uses date filtering, so entries without dates will not appear here.

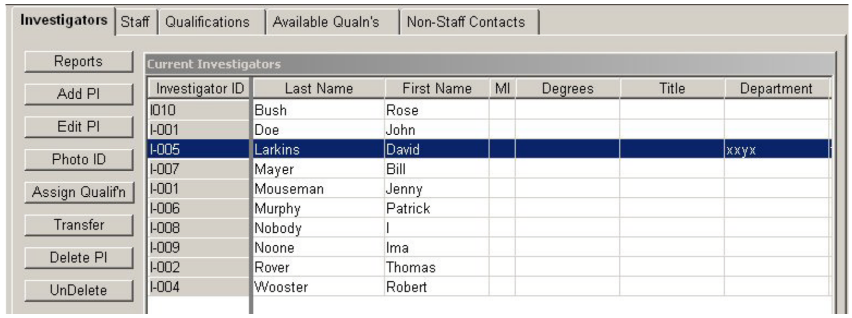
5. Press OK to save changes, and go to the Account Manager.

7. Go to the Procedures tab-page, choose the selection type “group,” and choose a filter period to see the results.

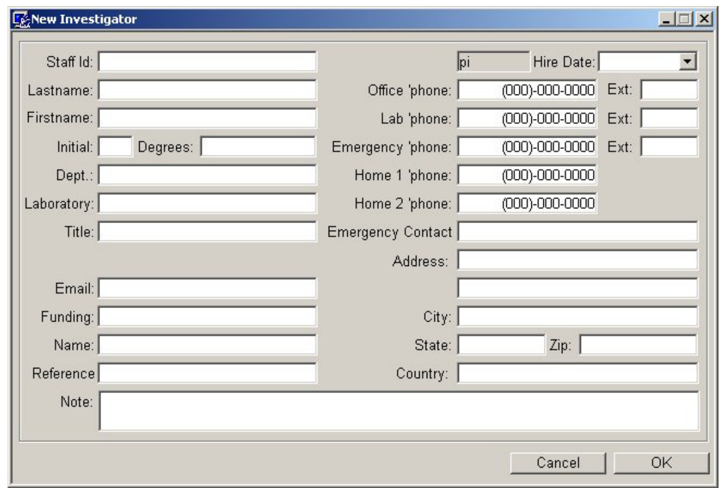
Notes

16. Team Manager

16.1 Investigators



Use this tab-page to keep track of your investigator staff. You can add a photo ID that will appear in the lower right corner of this tab-page when you select one of the PIs. Investigators added to this page will appear in drop-down lists for Investigator fields. For example, you can assign an investigator when creating or editing an IACUC protocol, or when creating or editing a sample. Investigators appear separately from other staff members.



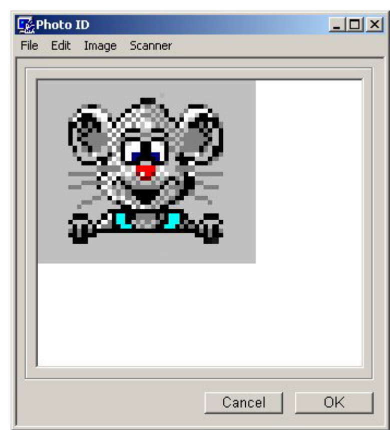
Reports, Edit PI, Delete PI, UnDelete

See Common Procedures.

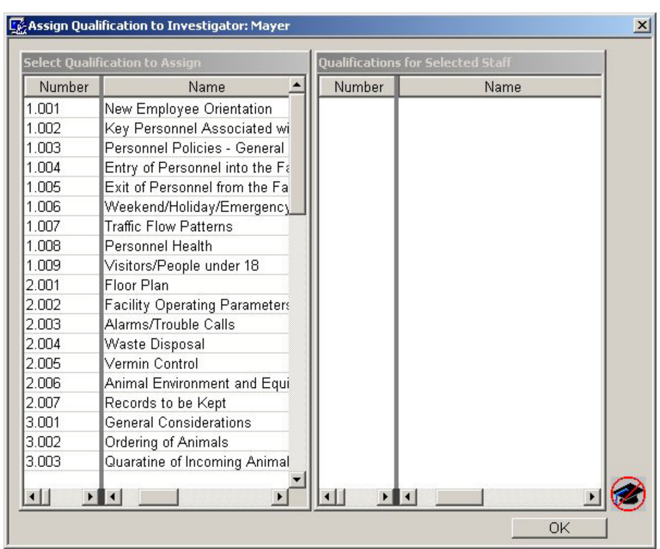
Add PI

Press this button to add a new principal investigator. Identify investigators with an ID number, first and last name, and title and department. You can also keep track of personal contact information here.

Photo ID



The Photo ID function allows you to quickly associate a name with a face. In the Photo ID window, press File, then Open. The default file type for adding a photo ID is .bmp, but you can also attach .jpg, .tif, and .gif files by using the file type selector at the bottom of the Select Image File window. Once you have selected a file to open, the image will appear in the photo ID window. Use the Image and Edit buttons to edit the image. Alternately, you can use the Scanner menu to import images directly from a local or networked scanner. Press OK to save photo ID changes.

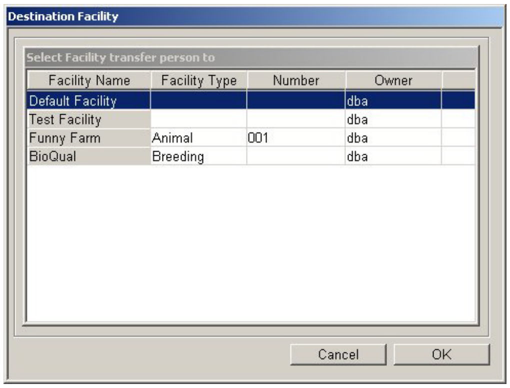


Tip: The selected picture will scale to fit in the photo ID space in the lower left corner.

Assign Qualif'n

Once you have created qualifications on the Available Qualn's tab-page, you can assign them to investigators using this function. Drag the desired qualifications from the window on the left to the window on the right to assign them. To unassign qualifications, drag them from the Qualifications for Selected Staff window to the picture of a crossed-out graduation cap in the lower right corner. Press OK to save changes.

Transfer



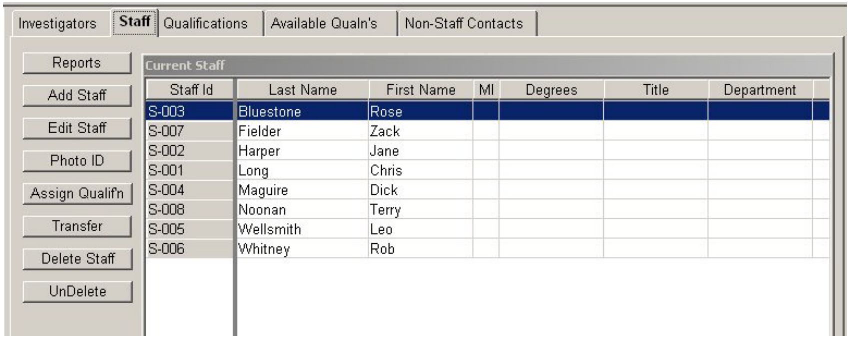
When you add a PI record, that record is only accessible within the facility in which it was created. If you would like to transfer the PI record to a different facility, select the record, press Transfer, and then select the desired facility from the list.

Tip: An investigator's record can only appear in one facility at a time; if you want to place a PI record in more than one facility, you must create a new record.

Image

Use the Photo ID function on this tab-page (also accessible when you edit an investigator) to change the image in the lower left corner.

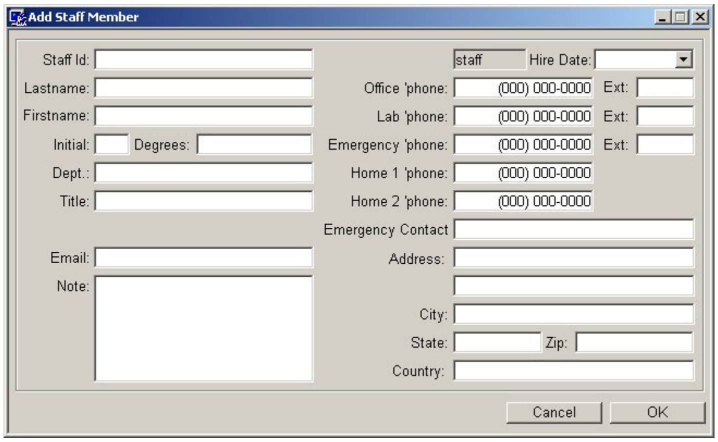
16.2 Staff



Use this tab-page to keep track of the rest of your non-investigator staff. You can add a photo ID that will appear in the lower right corner of this tab-page when you select one of the staff members. Staff members added to this page will appear in drop-down lists for Technician fields. For example, you can assign two technicians when creating or editing a study, or you can request a technician when creating or editing a task. Staff members appear separately from investigators.

Reports, Edit Staff, Delete Staff, UnDelete

See Common Procedures.



Add Staff

Press this button to add a new non-investigator staff member. Identify staff members with ID numbers, first and last names, and titles and departments. You can also keep track of personal contact information here.

Photo ID, Assign Qualif’n, Image

See section 16.1.

Tip: Qualifications are not staff-type specific. Investigators and staff members share the same Qualifications list.

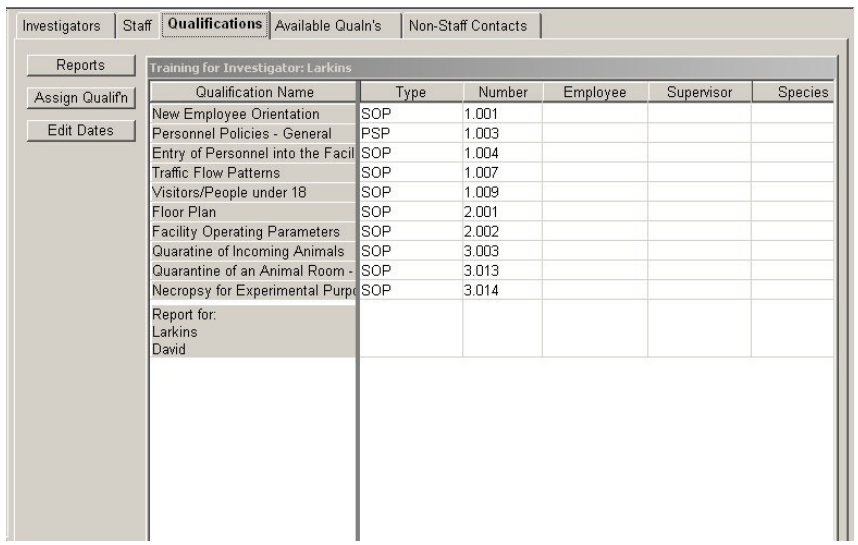
Transfer

When you add a staff record, that record is only accessible within the facility in which it was created. If you would like to transfer the staff record to a different facility, select the record, press Transfer, and then select the desired facility from the list.

Tip: A staff member’s record can only appear in one facility at a time; if you want to place a staff record in more than one facility, you must create a new record.

16.3 Qualifications

Select a PI on the Investigators tab-page or a staff member on the Staff tab-page to access his or her qualifications on this tab-page. You can assign additional qualifications to the selected member, or edit dates for qualifications training. The Training for Investigator/Staff: (selected PI or Staff Member) window displays a list of qualifications followed by a Report For field.



Reports

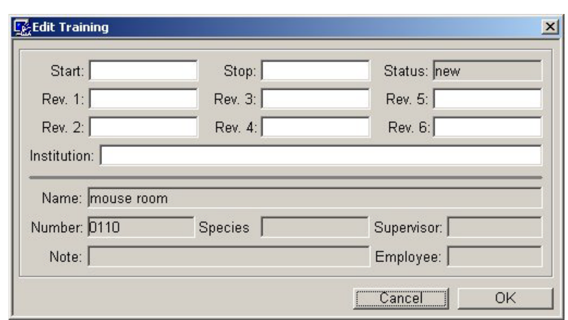
See Common Procedures.

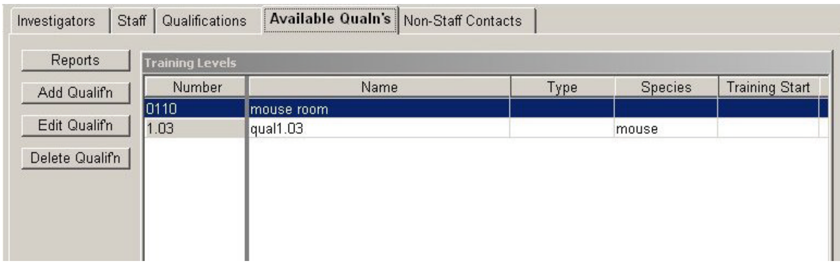
Assign Qualif’n

Press this button to assign qualifications to the staff member or investigator most recently selected on a tab-page. See section 16.1 for information on Assign Qualif’n.

Edit Dates

Choose one of the qualifications from the list at the top of the Training for window, then press Edit Dates to set up a training schedule for this qualification. The Start, Stop, and Rev 1-6 fields allow you to set dates with drop-down calendars, the Rev fields are for entering dates for training revisions.



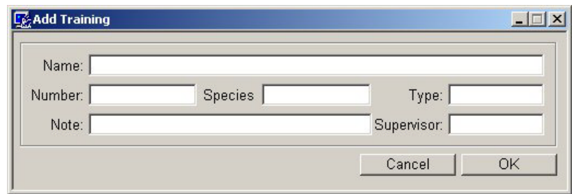


16.4 Available Qualn's

This is where you create the qualifications that can be assigned to PIs and staff members. A list of current qualifications appears in the Training Levesl window.

Reports, Edit Qualif'n, Delete Qualif'n

See Common Procedures.



Add Qualif'n

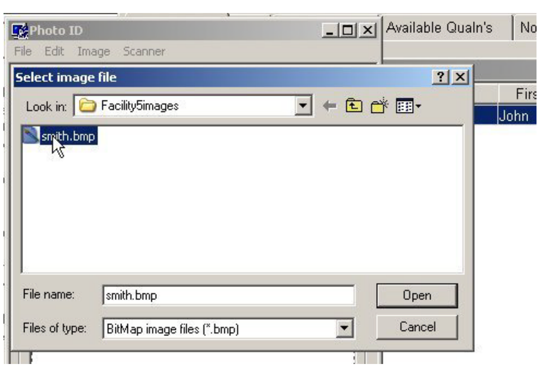
Manually fill in the desired fields for your new qualification level. Press OK to save the qualification.

Tip: This one list serves for both investigators and staff members.

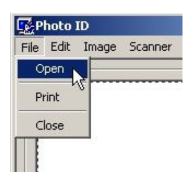
Tutorial: Create a Principal Investigator and Assign Qualifications

Assignment: Dr. Smith, who is the principal investigator for your aging experiment, needs a contact record and a qualification for a custom injection procedure.

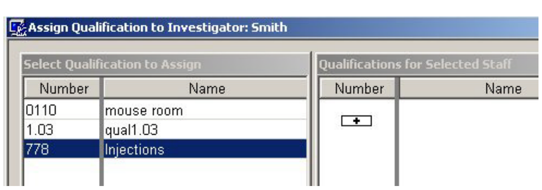
1. Go to the Available Qualn's tab-page, and press Add Qualif'n.
2. Enter a name of Injections and a species of mouse, and any other desired information. Press OK to create the qualification.
3. Go to the Investigators tab-page.
4. Press Add PI. Enter a Staff ID. Type "Smith" into lastname, and "John" into firstname. Set the title to "Dr."



5. Enter any other desired information, then press OK to create the PI record.
6. Select Dr. Smith in the list of Current Investigators, then press Photo ID.
7. Access a photo of Dr. Smith using the Scanner menu or Open in the File menu. Make sure the "select image file" type matches the file type you are trying to access.



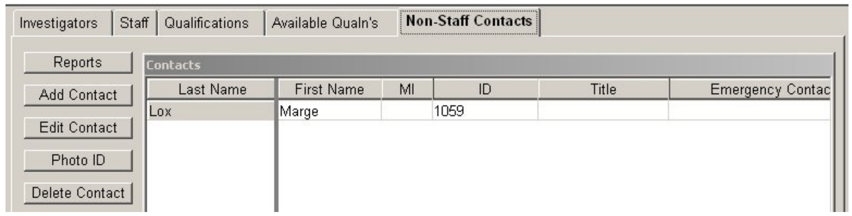
8. Press OK to accept the Photo ID.
9. Press Assign Qualif'n.



10. Drag the Injections qualification from the Select Qualifications to Assign window to the Qualifications for Selected Staff window.
11. Press OK to assign the selected Qualification.

12. Go to the Qualifications tab-page, and set up a training schedule for Dr. Smith to achieve the Injections qualification.

16.5 Non-Staff Contacts

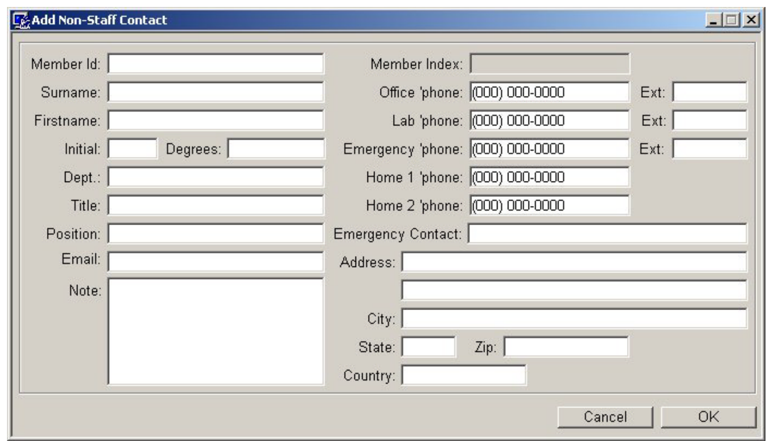


Keep track of any non-staff records your facility needs access to, for example contacts for bedding vendors or researchers associated with different facilities.You can add a photo ID that will appear in the lower right corner of this tab-page when you select one of the non-staff contacts. You cannot assign qualifications to non-staff contacts.

Reports, Edit Contact, Delete Contact

See Common Procedures.

Tip: Non-Staff Contacts cannot be undeleted.



Add Contact

Press this button to add a new non-staff contact. Identify non-staff contacts with Member ID numbers, first and last names, and titles and departments. You can also keep track of personal contact information here.

Photo ID, Image

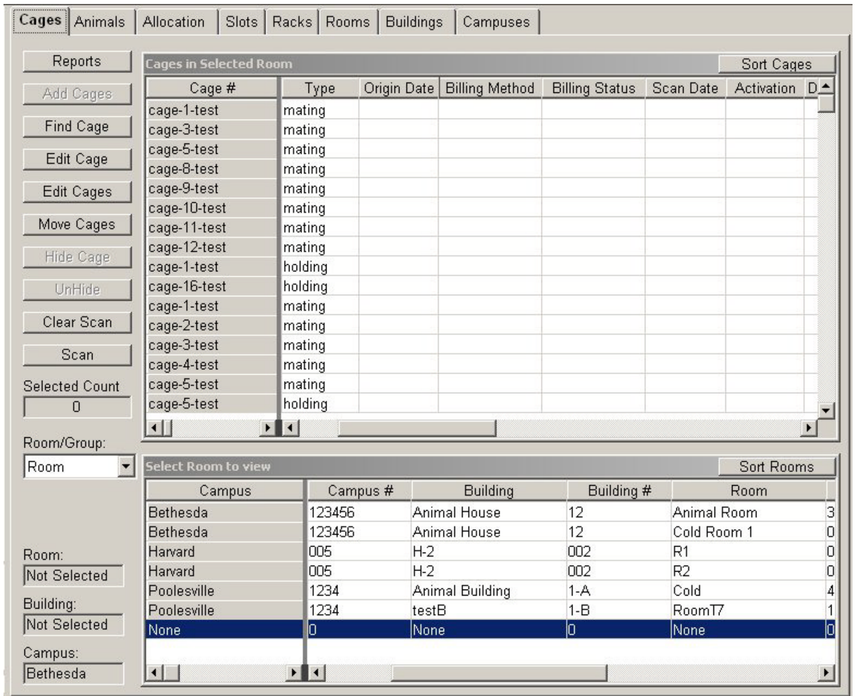
See section 16.1.

Notes

Notes

17. Location Manager

17.1 Cages



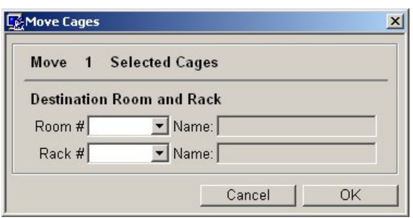
The Cages tab-page is similar to the Cage tab-page in the Cage Manager, except that it sorts cages by room instead of by group. Select a room from the list at the bottom of this tab-page, to view cages in the selected room at the top of the page. You can also scan cage cards with a barcode scanner to display them in the list. Once you have selected a cage, you can edit, view, or move it between rooms and/or racks.

Reports, Find Cage, Edit Cage, Edit Cages

See Common Procedures.

Add Cages, Hide Cage, UnHide

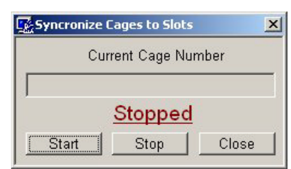
These buttons are not currently functional. To add, hide, or unhide cages, use the Cage Manager.



Move Cages

When you create or edit a cage, you have the choice to enter room and rack information. Room and rack information is provided by drop-down lists that you can customize in the Location Manager. Use the Move Cages function to transfer the selected cage(s) to a different rack and/or room. Note that rooms must belong to the facility in which the selected cages were created.

Clear Scan, Scan



If you have a barcode scanner that works with FACILITY, you can bring up cages in the Cages in Selected Room window by scanning them. Press Clear Scan to clear the selection and return to the room view.

Selected Count

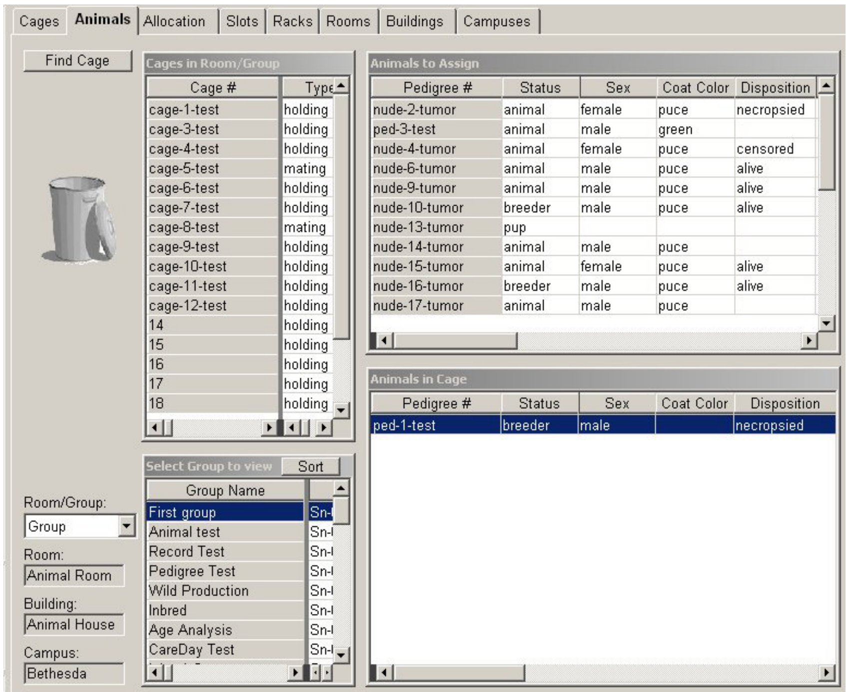
You have the option to select multiple cages in the Cages in Group window. The Selected Count window displays “number of cages selected”/ “number of cages not selected.”

Room, Building, Campus

These display the room, building, and campus for the currenly selected cage, if that cage has been assigned to a physical location.

17.2 Animals

The Animals tab-page functions similarly to the Assign tab-page in the Cage Manager. First choose whether you would like to see animals by group or by room with the Room/Group selector in the far lower left corner. Then select a group or room from the Select Room to view/Select Group to view display in the lower left corner. Once you have chosen a group or a room, select a cage from the holding cages listed in the upper left of this tab-page. If there are currently animals unassigned to cages in that group or room, they will appear in the Animals to Assign window in the upper right corner. Drag animals from the this window to the Animals in Cage window in the lower left corner to assign them to the selected cage. To unassign animals, drag them from the Animals in Cage window to the trash can image on the far left.



Find Cage

See Common Procedures.

Room, Building, Campus

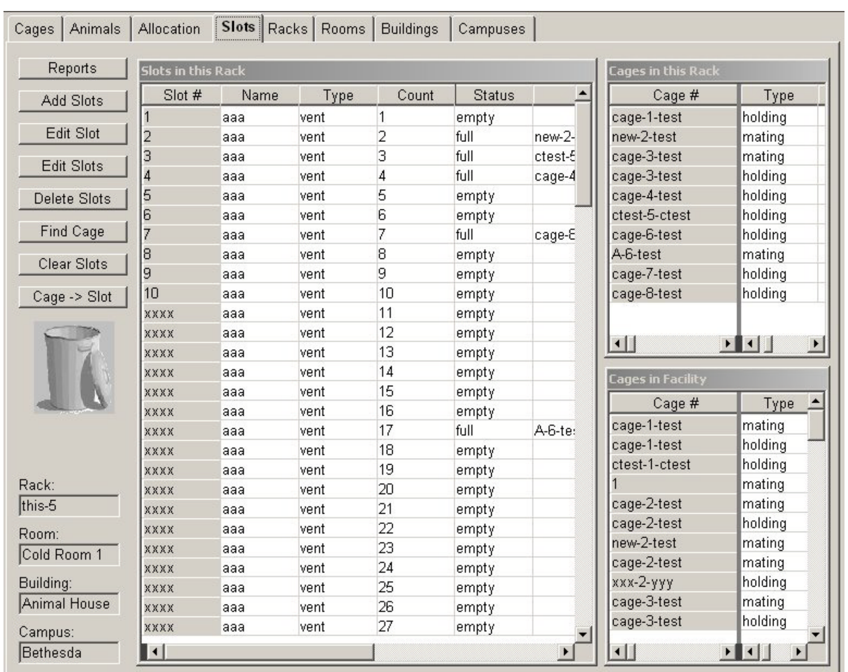
These display the room, building, and campus for the currenly selected cage, if that cage has been assigned to a physical location.

17.3 Allocation

The Allocation tab-page is in the process of being modified.

17.4 Slots

The Slots tab-page represents the smallest unit in the locations infrastructure. Once you have created a campus, building, room, and rack, you can create slots to go in the rack, and then fill the slots with cages. Because of this, the Slots tab-page is also the intersection of the physical locations of your animals (in buildings, rooms, racks, and cages) and their logical locations in Facility (in facilities, groups, and cages). This allows you to know precisely the physical location of your animals in your facility, in addition to the



location of your animals in Facility. First, create slots in the specified campus, building, room and rack (displayed in the lower left corner). Then, drag cages from the two windows on the right into the slots in the window on the left. When you put a cage in a slot, the cage number will appear in the Cage # field and the Status of the slot will go from "empty" to "full." To remove a cage from a slot, drag it to the picture of a trash can on the far left. You can replace a cage in a slot by putting a new cage into the same slot. You can also move a cage by selecting the name of a cage that has already been put in a slot in the windows on the right and placing it in a new slot (you will be told that you are moving a cage), The window in the upper right corner displays cages that were specified for the current room and rack during creation. The window in the lower right corner displays all cages in the current facility.

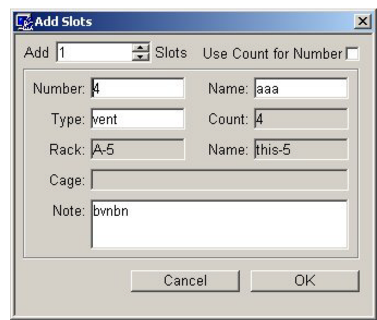
Tip: When assigning cages to slots, it doesn't matter what slot is currently selected.

Reports, Edit Slot, Edit Slots, Delete Slots, Find Cage

See Common Procedures.

Tip: You cannot edit Count, Cage, or Status from here. Cage and Status change when you place a cage in a slot; Count is the index number for the selected slot in the Facility database.

Add Slots

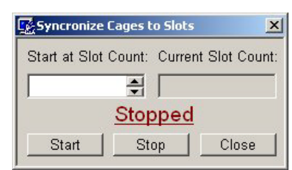


Press the Add Slots button to add slots to the currently selected rack, room, building, and campus. Use the counter in the upper left corner to set the number of slots you wish to create. Check the box in the upper right corner if you want to use the assigned count number to number your slots; you can also number the slots manually or with a barcode scanner.

Clear Slots

Press Clear Slots to return all slots in the currently selected rack to "empty" status. Cages removed in this manner will lose their room and rack designation.

Cage -> Slot



This function allows you to number cage slots by cage barcode. Select a slot to start at, and press Start to initiate a barcode session. Slots will move ahead automatically once you have entered a barcode. Press Stop when you are done numbering slots.

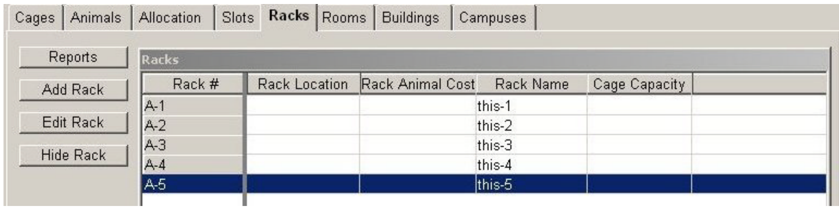
Rack, Room, Building, Campus

These fields in the lower left corner of the tab-page act as identifiers for the selected slots. In order to "set an address," go to the Campuses tab-page and select a campus. Select a building on that campus from the Buildings tab-page, a room in that building from the Rooms tab-page, and a rack in that room from the Racks tab-page.

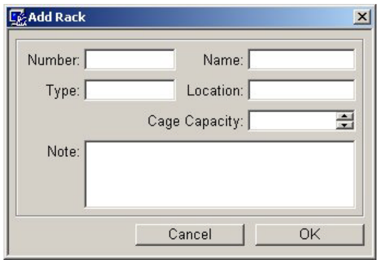
Tip: Fields display campus, building, room and rack names, not numbers.

17.5 Racks

Use this tab-page to add, edit and delete racks for the currently selected room, building, and campus. Once you



have created racks, you can use the Slots tab-page to create slots in the racks and assign cages to the slots. The rack currently selected on this tab-page will be listed in the Rack field in the lower left corner.



Reports, Edit Rack, Hide Rack

See Common Procedures.

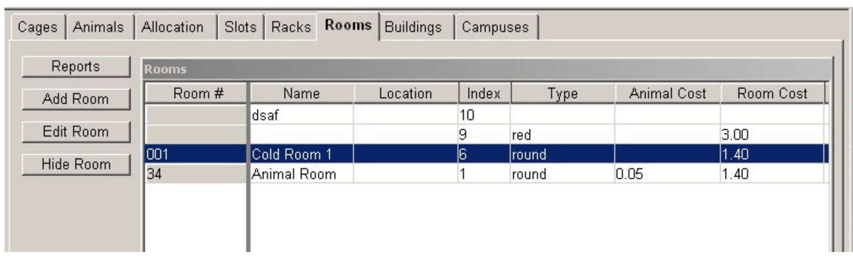
Add Rack

Press this button to add new racks to the selected room. Enter information into the provided fields, then press OK to save your changes.

Rack, Room, Building, Campus

The Rack, Room, Building, and Campus fields are in the lower left corner of this tab-page. See section 17.4 for information.

17.6 Rooms



Use this tab-page to add, edit and delete rooms for the currently selected building and campus. Once you have created rooms, you can use the Racks tab-page to create racks in the rooms. The room currently selected on this tab-page will be listed in the Room field in the lower left corner.

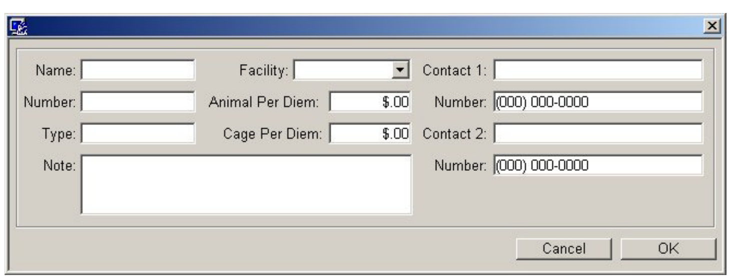
Logical and Physical Locations

About locations: Racks, Rooms, Buildings, and Campuses are all physical locations. A "facility" is a logical location, a unit of researchers and research space. Physical and logical locations are tied together in rooms. Rooms are physical entities that are assigned to logical facilities. You may have several rooms in a facility - these rooms are located in buildings on campuses. Similarly, you might have several facilities working in one building. These specifications allow you to customize Facility to your specific needs, whether you have one or two labs or a global network of research.

Reports, Edit Room, Hide Room

See Common Procedures.

Add Room



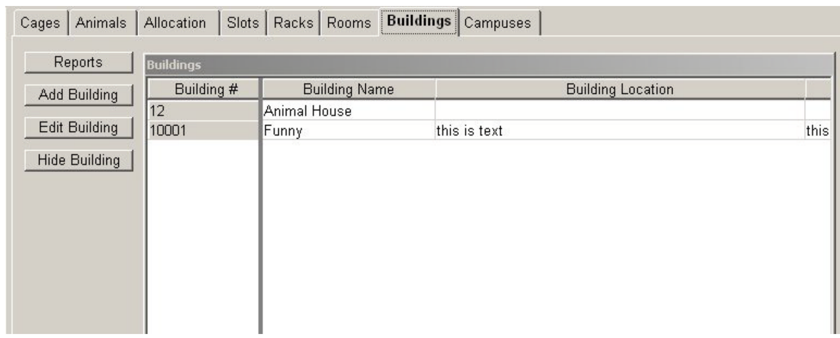
Enter information into the provided fields for your new room. This is where the logical and physical ideas of a facility intersect, so it's important to designate a facility for any rooms you create. Choose the facility you are currently working in to access rooms and assign cages to them from your current groups. Set the "type" drop-down list using "room type" on the Misc. 1 tab-page of the Global Lists menu - "Lists" on the menu toolbar.

Tip: Make sure you create rooms in the facility you are currently working in, otherwise you won't be able to use them.

Room, Building, Campus

The Room, Building, and Campus fields are in the lower left corner of this tab-page. See section 17.4 for information.

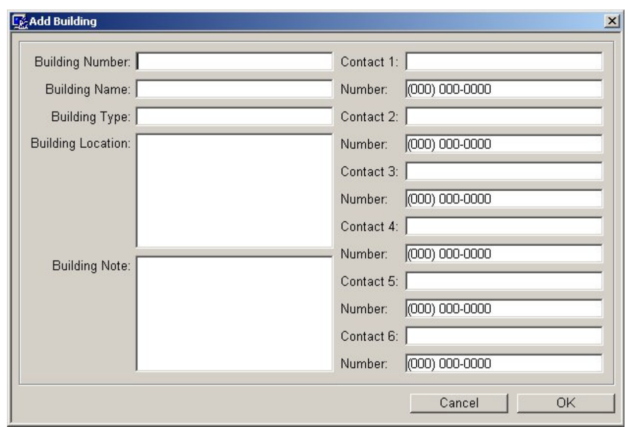
17.7 Buildings



Use this tab-page to add, edit and delete buildings for the currently selected campus. Once you have created buildings, you can use the Rooms tab-page to create rooms in the buildings. The building currently selected on this tab-page will be listed in the Building field in the lower left corner.

Reports, Edit Building, Hide Building

See Common Procedures.



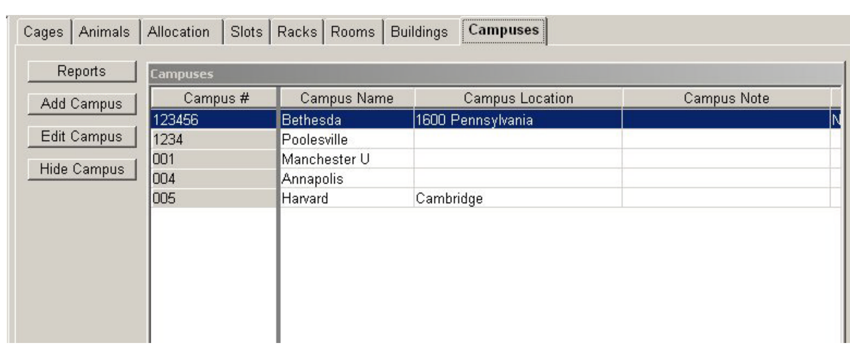
Add Building

Press this button to add new buildings to the selected campus. Enter information into the provided fields, then press OK to save your changes.

Building, Campus

The Building and Campus fields are in the lower left corner of this tab-page. See section 17.4 for information.

17.8 Campuses



Use this tab-page to add, edit and delete campuses. Once you have created campuses, you can use the Buildings tab-page to create buildings on the campuses. The campus currently selected on this tab-page will be listed in the Campus field in the lower left corner.

Reports, Edit Campus, Hide Campus

See Common Procedures.

Add Campus

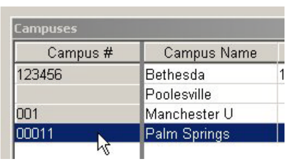
See Add Building in section 17.7

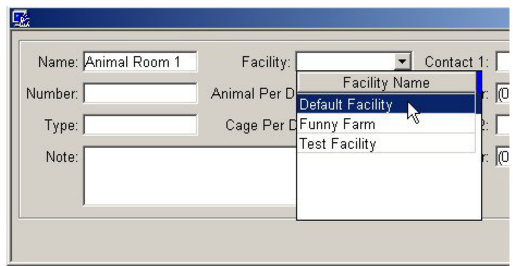
Campus

The Campus field is in the lower left corner of this tab-page. It shows the currently selected campus.

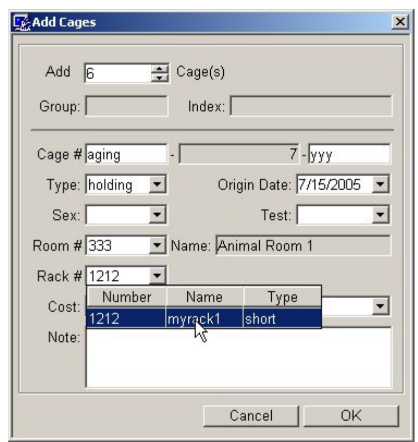
Tutorial: Create a Campus, Building, Room, and Rack, and Assign Cages to Slots

Assignment: Create physical locations for cages in your “aging” group.





1. Go to the Campus tab-page of the Location Manager.
2. Press Add Campus to create a new campus; enter a name, number, and any other desired information, then press OK.
3. Select your new campus in the Campuses window, then go to the Buildings tab-page.
4. Press Add Building to create a new building on the campus; enter a name, number, and any other desired information, then press OK.
5. Select your new building in the Buildings window, then go to the Rooms tab-page.
6. Press Add Room to create a new room; enter a name, number, and any other desired information.
7. Assign your new room to the facility you are currently working in, then press OK.

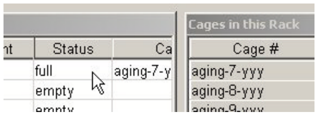


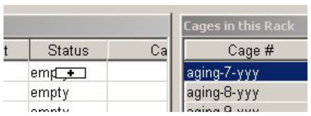
Tip: Current facility is displayed in the lower far left corner of the Facility window.

8. Select your new room in the Rooms window, then go to the Racks tab-page.
9. Press Add Rack to create a new rack; enter name, number, and anny other desired information, the press OK.
10. Select your new rack in the Racks window.
11. Go to the Cages tab-page of the Locations Manager.
12. Select the group “aging” from the list of groups at the bottom of the tab-page, and press

Add Cages.

13. Set the cage type to “holding,’ and select the room and rack you just created from the provided drop-down lists.





14. Press OK to create the new cages.

15. Go to the Slots tab-page of the Location Manager. Make sure that the fields in the lower left corner are correct.

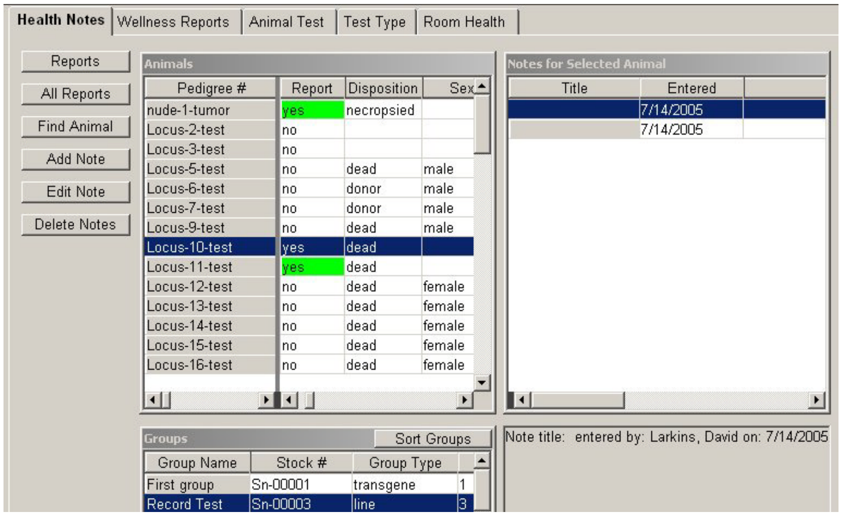
16. Press Add Slots. Check the “Use Count for Number” checkbox to automatically number your slots, enter a number into the Number field to apply to all your slots, or leave this field blank and edit individual slot numbers later.

17. Your “aging” cages will appear in the Cages in this Rack window. Drag cages from here to the Slots in this Rack window to assign cages.

Notes

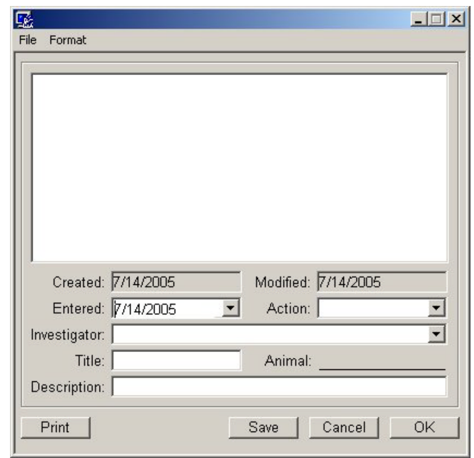
Notes

18. Health Manager



18.1 Health Notes

The Health Notes tab-page allows you to enter notes on animal health for the currently selected animal. Select a group in the Groups window, then select an animal from the Animals window. Add, edit, or delete notes in the Records for Selected Animal window. Once a health note has been made for an animal, the “Report” status will change to Yes and the field will turn green.



Reports, Find Animal, Edit Note, Delete Notes

See Common Procedures.

All Reports

All Reports shows health notes belonging to all current groups. See Common Procedures for more information.

Add Note

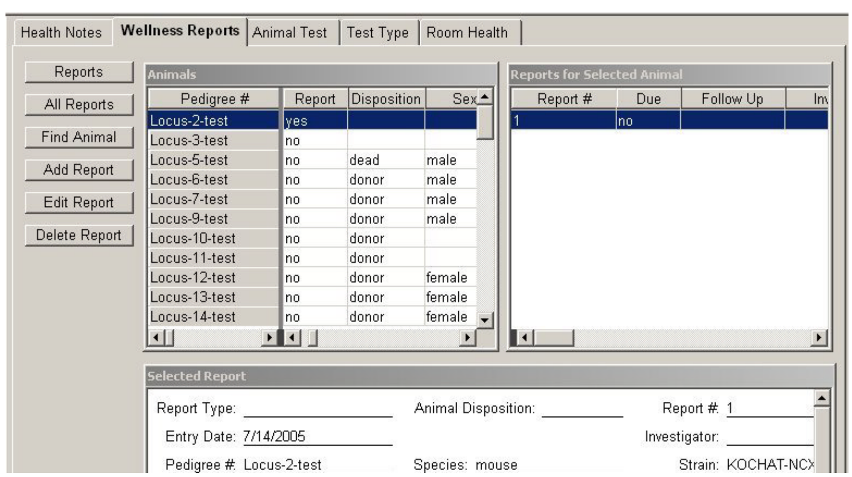
Press Add Note to add a new health note for the selected animal. Enter text into the large text field at the top of this window. Use the items on the menu toolbar to format the text. Enter information into the provided fields, then press OK to create your new health note.

Tip: Each animal can have several health notes associated with it; notes are displayed in the Notes for Selected Animal window.

18.2 Wellness Reports

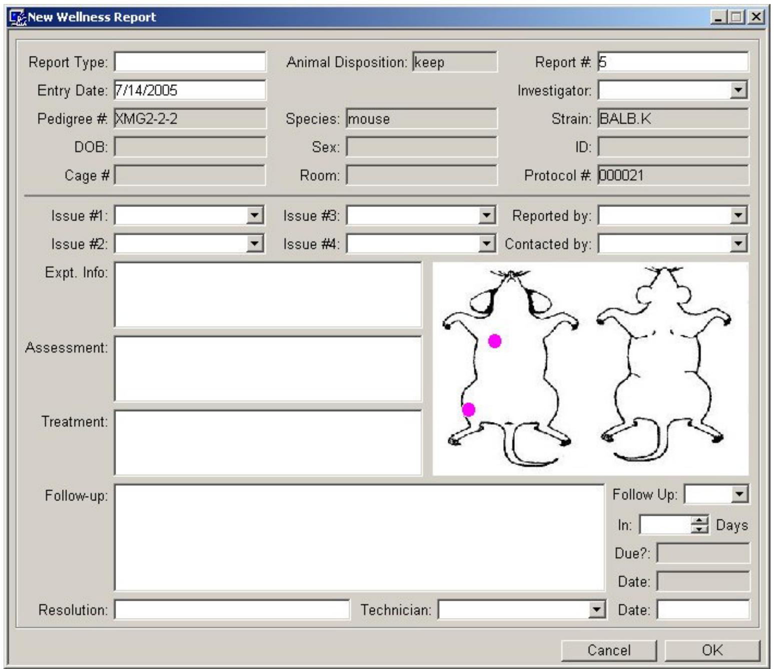
This tab-page allows you to create wellness reports for the selected animal from the group currently selected on the Health Notes tab-page (or elsewhere in Facility). A wellness report will allow you to keep track of the health of your animal, along with any prescribed procedures or treatments.

Tip: Each animal can have several wellness reports associated with it; notes are displayed in the Reports for Selected Animal window.



Reports, Find Animal, Edit Report, Delete Report.

See Common Procedures.

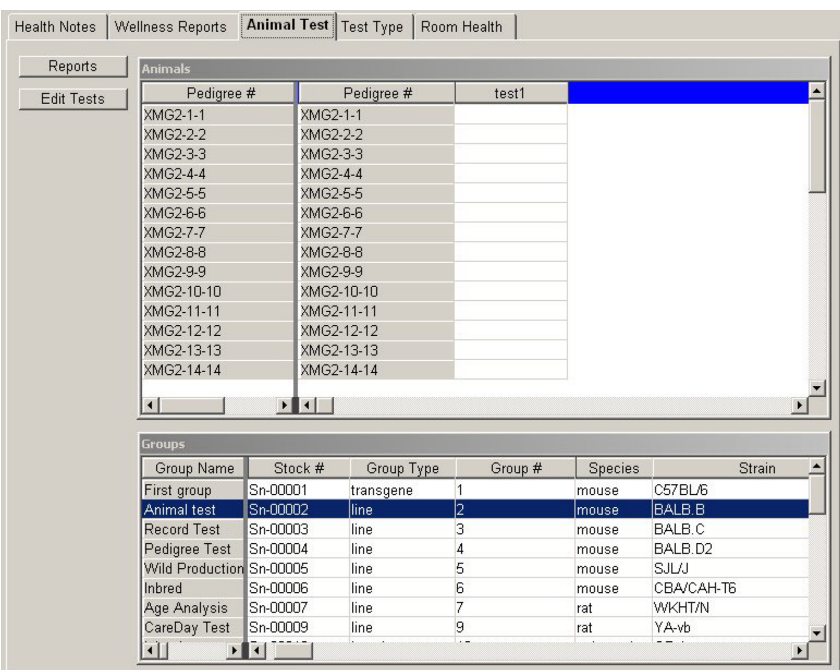


All Reports

All Reports shows information for wellness reports belonging to all current groups. See Common Procedures for information on reports.

Add Report

Press Add Report to open a new wellness report form for the selected animal. The top part of this form mostly has preset data - provided when you selected the group and the animal. The bottom part or the form allows you to describe various issues, assessments, treatments, and follow-ups for the selected animal. You can place up to six colored dots on the top and bottom views of the mice to point out where the animal is having issues.



18.3 Animal Test

The Animal Test tab-page allows you to keep track of tests for each animal individually. Select a group from the bottom window on this tab-page to view pedigree numbers and test type fields for each animal in the group. Customize test-type fields on the Test Type tab-page. When you create a test type, you can choose to have an associated date field that will also appear in the Animals window.

Reports, Edit Tests

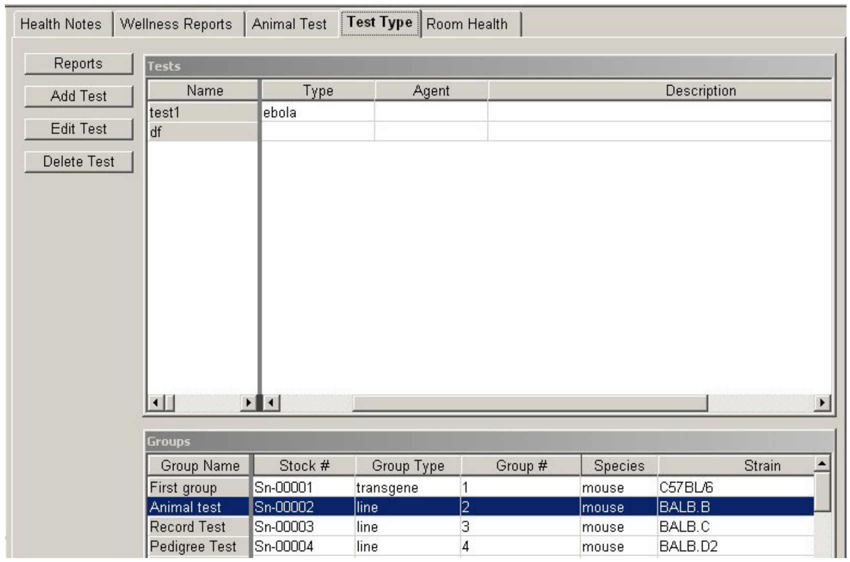
See Common Procedures.

18.4 Test Type

The Test Type tab-page allows you to customize the fields that will appear on the Animal Test tab-page for the animals in the selected group. Each group has its own set of test types.

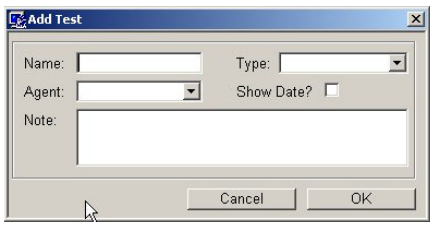
Reports, Edit Test, Delete Test

See Common Procedures.

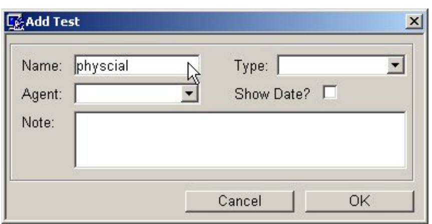


Add Test

Press Add Test to add a new test type to the selected group. Enter information into the provided fields, then press OK to create the new test type. Check the Show Date box if you want to create an associated date field.

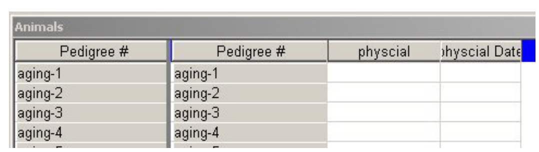


Tutorial: Recording Animal Test Data

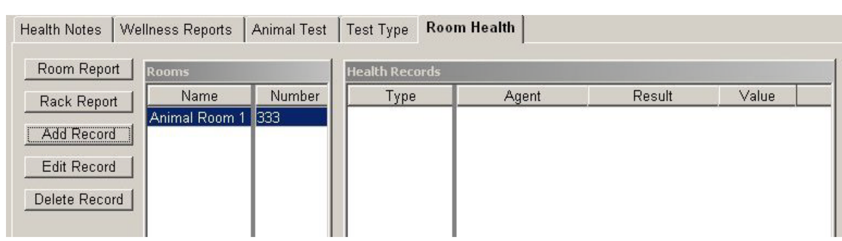


Assignment: Create a "physical" animal test and record test data for animals in your "aging" group.

1. Go to the Test Type tab-page and select the group "aging."
2. Press the Add Test button.
3. Enter the name "physical" for the animal test type. Fill in the rest of the provided fields as necessary.
4. Check the Show Date box, and press OK to create the new test type.
5. Go to the Animal Test tab-page, and select "aging" from the groups list.
6. Note that the animals in this group now have "physical" and "physical Date" fields.
7. Press Edit Tests to open the test edit form.
8. When you are done editing information, press OK to save your changes.



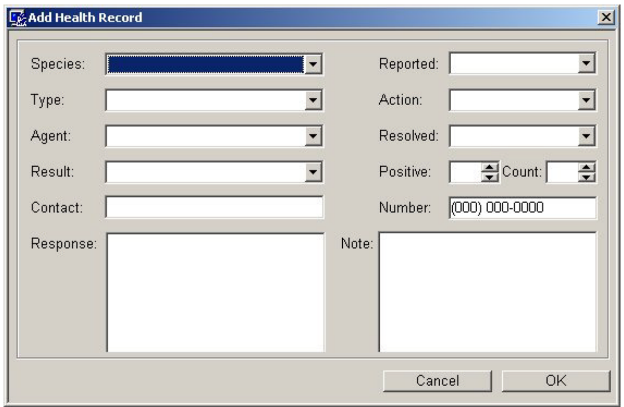
18.5 Room Health



This tab-page allows you to keep track of the health of rooms you have created in the Location Manager. To use this tab-page, first go to the Campuses tab-page of the Location Manager and select a campus. Then select a building on the Buildings tab-page and a room on the Rooms tab-page. This builds the address that appears in the lower left corner of the Room Health tab-page. The Rooms window shows all rooms in the selected building, allowing you to look at health records for different rooms in the selected building.

Room Report

This report shows health record information for all displayed rooms. See Common Procedures for information on reports.



Rack Report

This report shows health record information for all racks in the selected room. See Common Procedures for information on Reports.

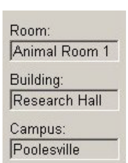
Add Record

Press Add Record to add a new health record for the selected room. Enter information into the provided fields, then press OK to create your new health record.

Tip: Each room can have several health record associated with it; records are displayed in the Health Records window.

Edit Record, Delete Record

See Common Procedures.

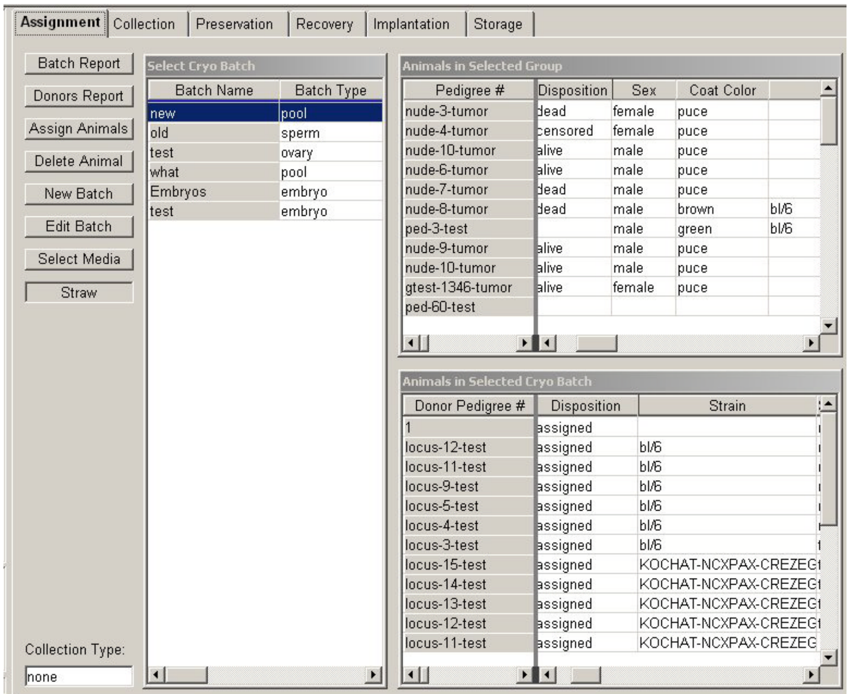


Room, Building, Campus

These fields in the lower left corner of the tab-page act as identifiers for the current rooms.

Notes

19. Cryopreservation Manager



19.1 Assignment

On this tab-page, you can create new cryo batches and assign animals to them from the selected group. First, go to the Group Manager (or elsewhere in FACILITY) to select the desired group from which to assign animals. These animals will appear in the Animals in Selected Group window. Add batches that will appear in the Select Cryo Barch window. Animals assigned to a cryo batch using the Assign Animals function will appear in the Animals in Selected Cryo Batch window in the lower right corner.

Tip: Cryo lines are not group-sensitive; the same line list will appear no matter what group is selected.

Batch Report

Press this button to see a report about cryo batches.

Donors Report

Press this button to see a report about donors (animals assigned to cryo batches).

Tip: See Common Procedures for more information on Reports.

Assign Animals

To assign animals to a cryo batch, select the batch, then select one or more animal(s) from the Animals in Selected Group window. Press Assign Animals, and the selected animal(s) will appear in the Animals in Selected Cryo Batch window. “Disposition” for these animals will change to “assigned.”

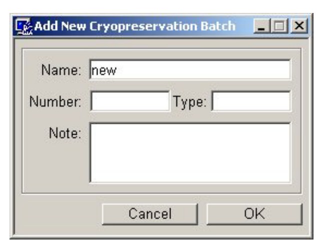
Tip: Donor animals should be female.

Delete Animal

Use this button to remove animals from the selected batch. Select an animal in the Animals in Selected Cryo Batch window and press Delete Animal.

Tip: This does not remove the animal’s record from Facility.

New Batch, Edit Batch



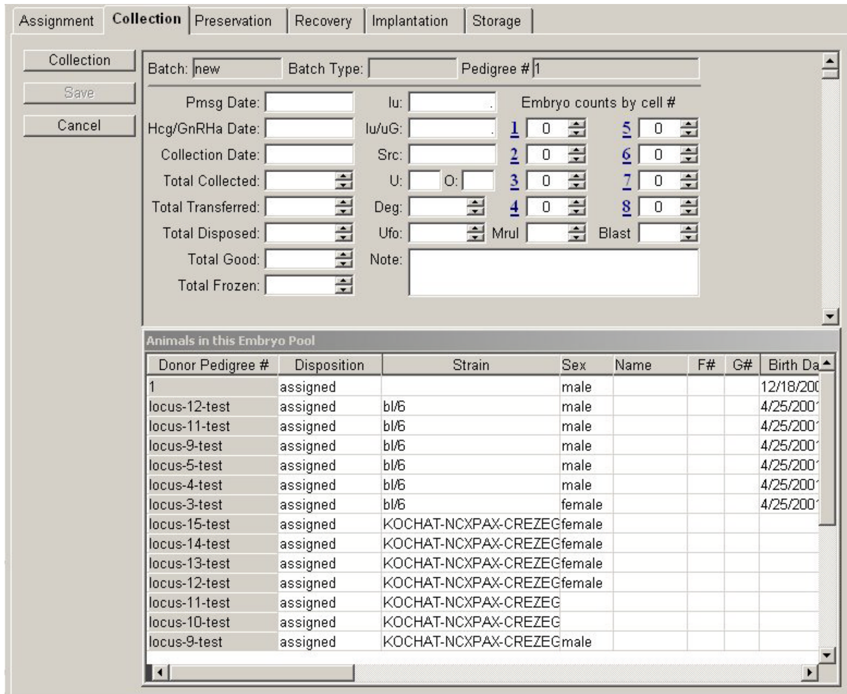
Press New Batch to create a new cryo batch of type Embryo. Pool, Ovary, or Sperm. Enter information into the provided fields, then press OK to save the new batch.

Once you have created a batch, you can assign animals to it from the selected group.

Select Media

Choose Vial or Straw.

19.2 Collection



Select a cryo batch on the Assignment tab-page in order to edit information for that batch's donors on the Collection tab-page. Choose a donor from those listed in the "Animals in this [type of currently selected batch]" window, then use the information fields provided above to edit the animal's information. Once you save edited animal information, the disposition of the donor will change to "collected."

Collection

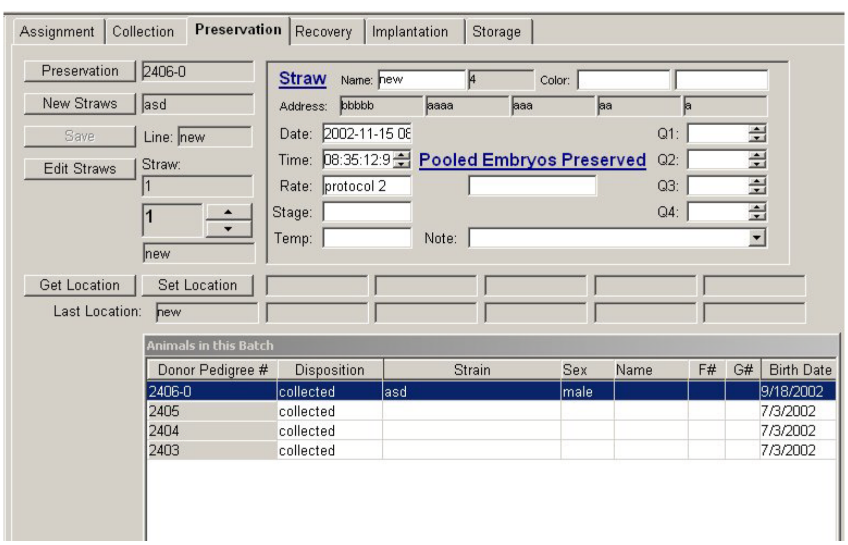
Press this button to see a report for the cryo line. See Common Procedures for information on reports.

Save

See Common Procedures.

Cancel

Press Cancel to undo any changes you have made since the last save.



19.3 Preservation

Once you have collected from a donor on the Collection tab-page, that donor will appear on the Preservation tab-page. Select an animal to view it's record in the upper right corner. You can enter and edit information directly on this tab-page by clicking in the available fields.

Preservation

Press this button to see a preservation report. See Common Procedures for information on reports.

New Straw

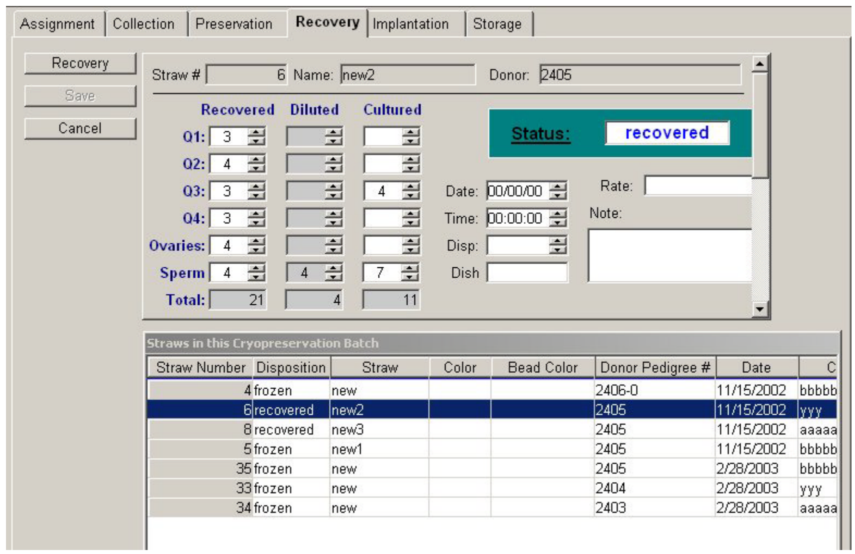
Press this button to create new straws for the selected animal. When you create a new straw, the number under “Straw” to the right of the Save button will increase. Use the up and down arrows underneath the number of straws to move between straw records. For each record, you can edit information directly on the tab-page.

Tip: You must have a valid location in order to create a new straw for the selected animal.

Save

See Common Procedures.

19.4 Recovery



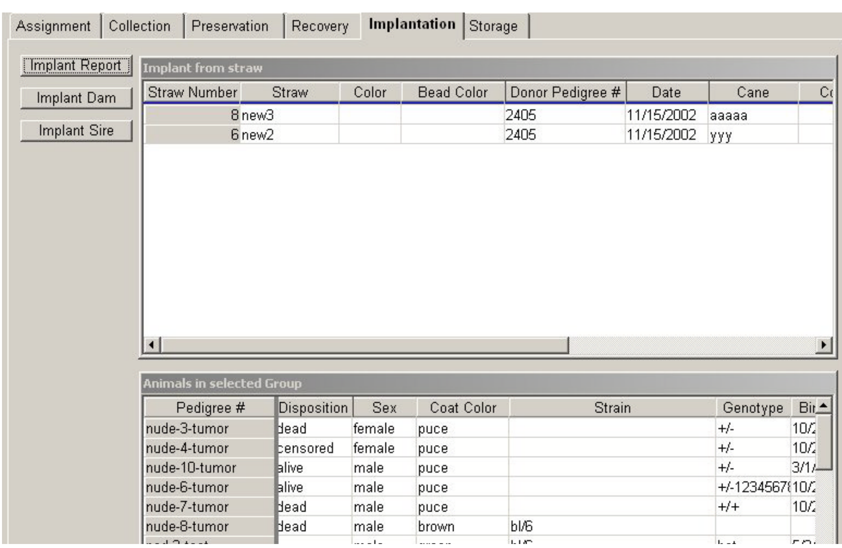
The Recovery tab-page shows a list of all the straws for the currently selected cryo line. Select a straw to view that straw’s information above the straws list. You can edit straw information directly on this tab-page.

Recovery

Press Recovery to view a recovery report. See Common Procedures for more information on reports.

Save

See Common Procedures.



Cancel

Press Cancel to undo any changes you have made since the last save.

19.5 Implantation

Use this tab-page to record the implantation of straws into animals. The list of available animals in the lower part of the tab-page includes all animals belonging to the selected group. Only straws that have recovered items on the Recovery tab-page will appear in the Implant from Straw window.

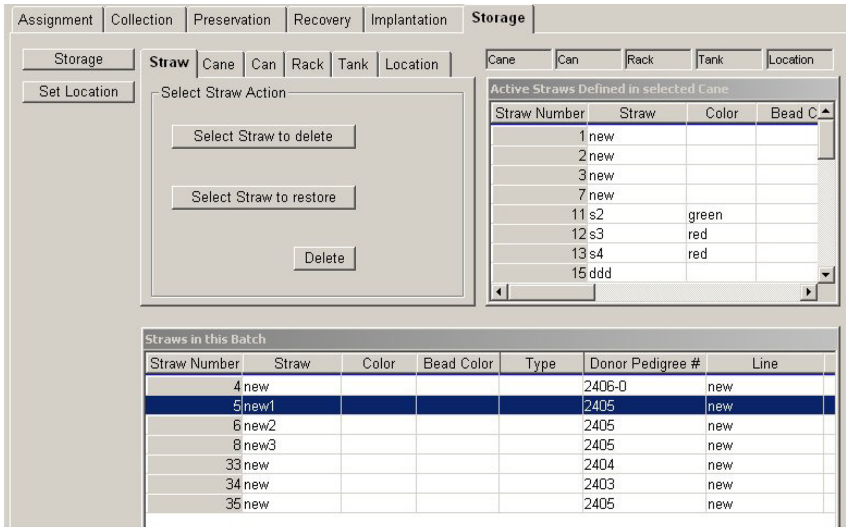
Implant Report

See Common Procedures for information about reports.

Implant

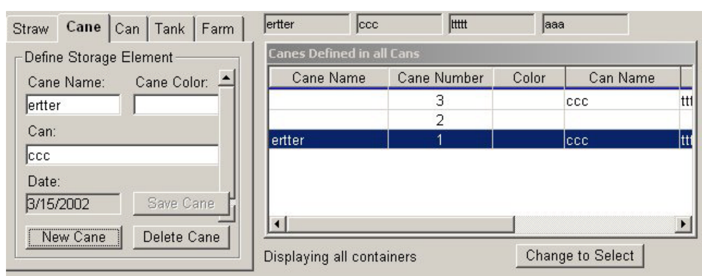
Press Implant to apply a selected straw from the top window to a selected animal in the bottom window.

19.6 Storage



The Storage tab-page allows you to keep track of cryopreservation straws, canes, cans, tanks, and farms. Click on the tab-pages in the upper left corner to access these various types. The bottom window shows straws in the selected cryopreservation line, and the contents of the upper right window vary depending on what tab-page is selected.

Storage



Click on Storage to view storage reports. See Common Procedures for information on reports.

Storage

This button is not currently functional.

Straw

Go to the Straw tab-page to delete or restore current straws. Toggle the window in the upper right between the “straws to delete” view and the “straws to restore” view. Press Delete or Restore to delete/restore the selected straw. You can also switch between viewing all straws, and viewing only the selected straws.

Cane

Press Cane to create new canes in the currently selected can, or to delete canes. You can choose to view only the canes in the selected can, or canes in all cans. To create a new cane, press New Cane, enter cane information, then press Save Cane.

Can

Press Can to create new cans in the currently selected tank, or to delete cans. Can functions are the same as Cane functions.

Tank

Press Tank to create new tanks in the currently selected farm, or to delete tanks. Tank functions are the same as Cane functions.

Farm

Press Farm to create or delete farms. Farm functions are the same as Cane functions.

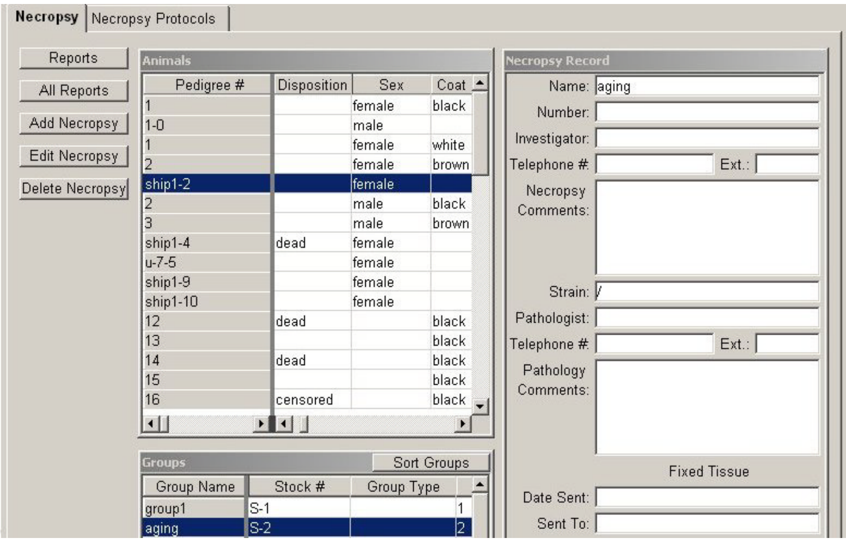
Notes

Notes

20. Necropsy Manager

20.1 Necropsy

The Necropsy tab-page allows you to creat new necropsy records for your selected group and animal. Select a group in the lower left corner, then select an animal in the upper left corner to add, edit or delete necropsies for the selected animal. The window on the right shows necropsy records for the current animal. You can add as many necropsy reports as you like, although you can only view one report at a time. Use the slider bar to the right to move between necropsy records.

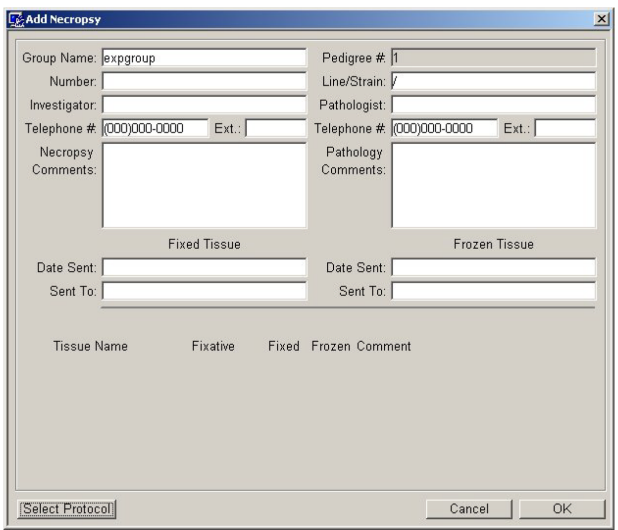


Reports, Edit Necropsy, Delete Necropsy

See Common Procedures.

All Reports

All Reports shows a list of all necropsies for all current groups. Click on a necropsy record under one of the group headings to see the form for that necropsy. See Common Procedures for more information on Reports.

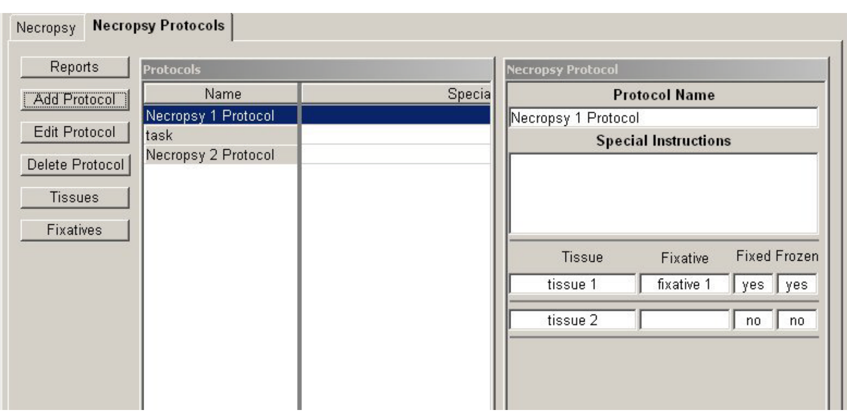


Add Necropsy

Press this button to open a new Add Necropsy window. Use the Select Protocol button to attach protocols that have been created on the Necropsy Protocol tab-page. When you have entered the required information, press OK to create a new necropsy record for the selected animal.

20.2 Necropsy Protocols

The Necropsy Protocols tab-page allows you to create protocols that can be attached to new necropsy records you create on the Necropsy tab-page.

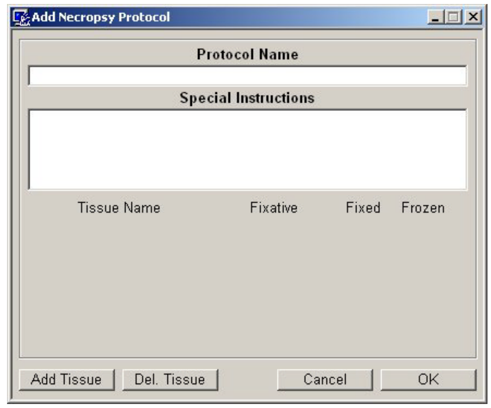


Reports, Edit Protocol, Delete Protocol

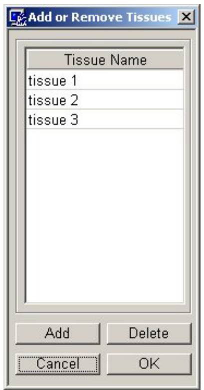
See Common Procedures.

Add Protocol

Press Add Protocol to open a new Add Necropsy Protocol window. Enter a name and note (if desired), then use the Add Tissue button to add new tissue fields to the window. Once you have added a tissue field, you can enter tissue and fixative information (edit these lists using the other buttons on the Necropsy Protocols tab-page) and enter “yes” or “no” in the fixed and frozen fields. To delete a tissue field, select it and press Delete Tissue. Press OK to create the new protocol.



Tip: Make sure you enter information before you press OK, or your new protocol will not be saved.



Tissues

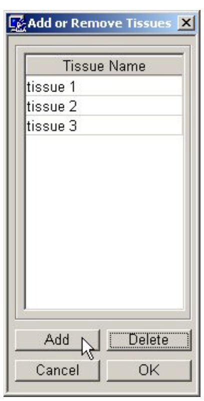
The Tissues button will allow you to customize the tissue drop-down list for when you are creating a necropsy protocol. Press Add to create a new tissue field, then type in the new text space. To edit a tissue type, click in the tissue field. You can also delete the selected tissue type. Press OK to save changes, or Cancel to exit without saving.

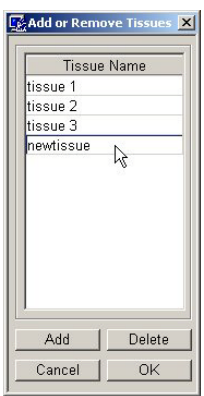
Fixatives

The Fixatives button will allow you to customize the fixative drop-down list for when you are creating a necropsy protocol. Adding, editing, and deleting fixatives functions the same as adding, editing, and deleting tissues; see above for information.

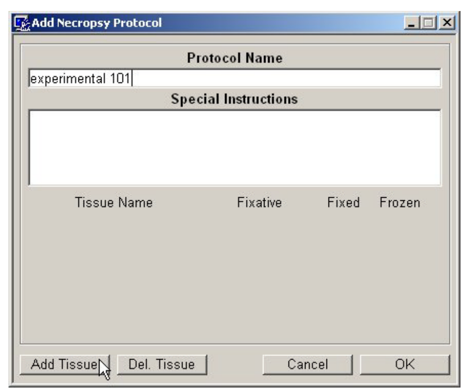
Tutorial: Creating Necropsy Protocols and Necropsy Records

Assignment: Record necropsy details for animals in your “aging” group.

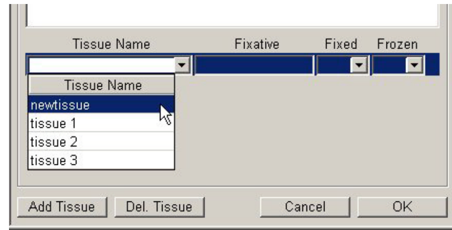


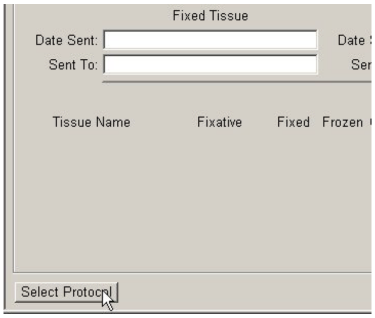


1. Go to the Necropsy Protocols tab-page.
2. Press the Tissues button.
3. Press Add, and enter the name of your new tissue type.
4. Enter any additional tissue types, then press OK.
5. Press the Fixatives button.
6. Add any desired fixative types, then press OK to return to the Necropsy Protocols tab-page.
7. Press Add Protocol, and enter a name for your new necropsy protocol.
8. Enter any protocol notes, then press the Add Tissue button.
9. Use the drop-down list to select a tissue type.
10. Use the drop-down lists to set Fixative, Fixed, and Frozen.



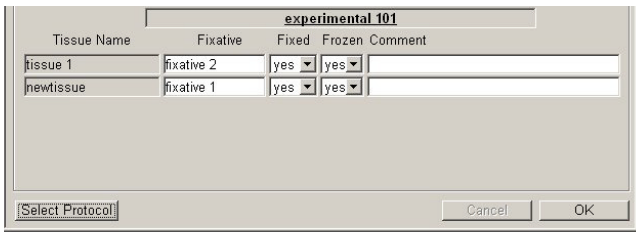
11. Press OK to create the new protocol.
12. Go to the Necropsy tab-page and select the group “aging” in the lower left corner.





13. Select an animal from the window in the upper left corner, and press Add Necropsy.
14. Enter a name for your new necropsy, and any other required information.
15. Use the Select Protocol button in the lower left corner to assign a protocol to your new necropsy.

Tip: You can only assign one protocol at a time to a necropsy.



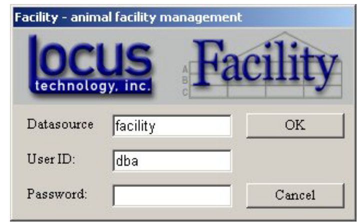
15. Once you have assigned a protocol, new fields will appear in the Add Necropsy window as specified by the protocol form.
16. If you want, you can change information in the Fixative, Fixed, and Frozen fields. You can also add a comment.
17. Press OK to create the new necropsy.

Notes

Notes

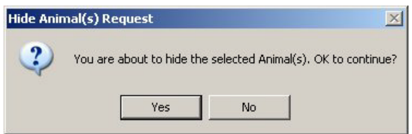
Appendix A: Security

Logging In to Facility



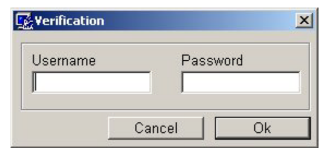
You must have a valid User ID and password to log in to Facility. User IDs also allow administrators to keep track of who is using Facility. Once you are logged in, you will have access to all areas specified by your access privileges when your user name was added. Look under Grants on the Setup menu of the menu toolbar for more information on adding users and assigning user privileges.

Request Verification



Request verification is one of the ways Facility makes sure you don't accidentally delete or hide the wrong information. In most cases, you will be asked for verification if you wish to delete or remove items. Press "Yes" to verify the request, or "No" if you want to continue without making the specified changes.

Administration



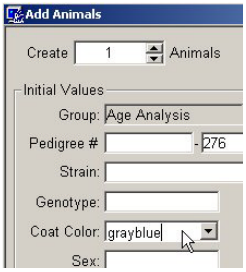
Functions in the Setup menu on the menu toolbar are only availabe to users groups with administrativie privileges. Each time you wish to use Administration, Options, or Lists on the menu toolbar, you must enter a valid User ID and password.

Notes

Notes

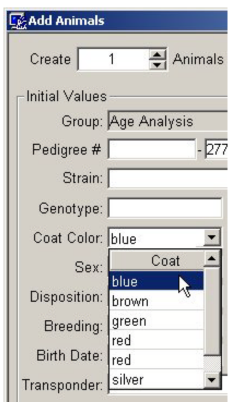
Appendix B: Common Procedures

Entering/Editing Information



Entering and editing data is a consistent process throughout Facility. Most fields allow you to enter data manually; to do so, click in the field and type the desired information. You can select fields with the mouse pointer, or use the Tab button to jump from field to field. Some fields have limits on the types of information you can enter - for example, only data of the format month/day/year or month.day.year can be entered in a field that requires a date. Other fields do not have explicit limits even though only specific types of information make sense. That is, when entering the sex or breed of an animal, for example, you will not necessarily be warned against using a response that is not in the drop-down list, such as "orange" or "three." Because of this, it is often a good idea to use the drop-down lists to make sure you enter the correct information in the correct field. Note that in some areas, you must use a drop-down list, but most fields that use drop-down lists also allow manual entry. Drop-down lists can be modified using the methods described under Lists in the Setup menu of the menu toolbar.

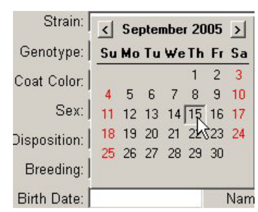
Drop-Down Lists



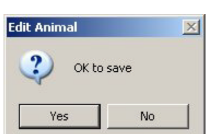
To access a drop-down list, click in the far right of a data field. An arrow will appear in the data field (some fields display this arrow automatically) and a list of options will pop up underneath the data window if a drop-down list is available. Click on the desired option to select, or use the up and down arrow keys to scroll through the provided items.

Drop-Down Calendar

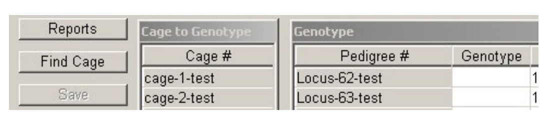
A drop-down calendar will appear automatically when you select the drop-down list for a date window. Scroll through the months with the arrows at the top of the calendar and click on the number of the day you wish to select. The drop-down calendar is useful if the desired date is fairly close to the current date (the current date appears as the default), but for distant dates you might prefer to enter the year, at least, manually.

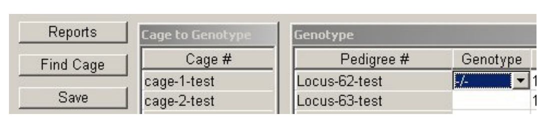


Saving Changes



On most tab-pages, you do not need to save your changes manually. Changes are usually saved automatically when you press OK after modifying data. If you press Cancel instead of OK, you will be asked if it is okay to lose any changes you have made. Pressing "yes" will close the window without saving; pressing "no" will return you to the open window. If you attempt to close the window with the X in the upper-right corner, you will be asked if it is okay to save any changes that have been made. Pressing "yes" will save and close the window; pressing "no" will return you to the open window. Pages where you must save manually have Save buttons that will generally be grayed out unless changes have been made.

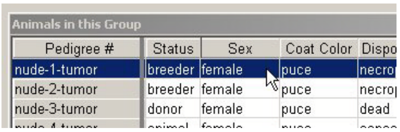


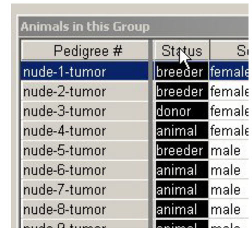


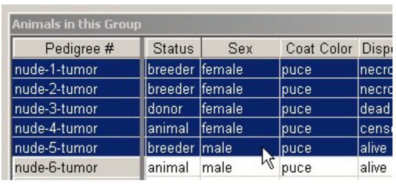
Key Shortcuts for Selecting Multiple Items

You will often find it useful to select several items in a list and perform a function on those items at the same time, instead of manipulating each item seperately. For example, you might want to assign three animals in a row to a new group, or you might want to hide the first and last column in a report.

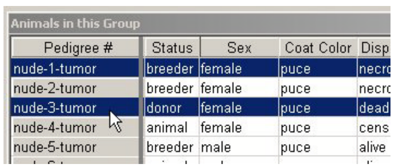
Selecting a single item is straightforward - click anywhere in a row to select the whole row, or click in the header field of a column to select a column. To select several consecutive items, click on the first one in the list (animal, column header field, staff member, etc.), then click on the last item in the list while holding the "Shift" key. All items between should now appear black or blue, depending on whether you are selecting rows or columns.



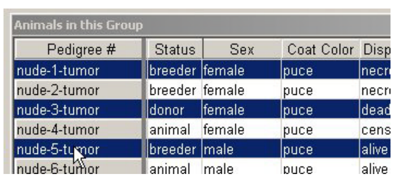


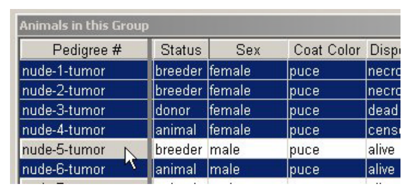


To select several non-consecutive instances, hold down the "Ctrl" key while clicking on the items. You can use shift-select and ctrl-select at the same time to select variously grouped items in the list. Items selected using the Shift or Ctrl methods can now be manipulated as if they were one item.

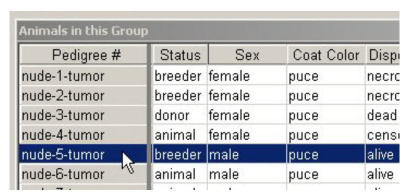


Click in the header field of a column to deselect all other selected columns. Alternately, click in one of the rows (outside of the header field) to deselect all columns.

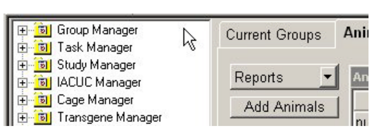




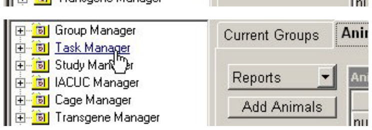
Deselecting rows is somewhat different. If you have selected multiple rows using Ctrl or Shift, clicking on one of the currently selected rows (while not holding down any buttons) will deselect only that row. This allows you to, for example, select a group of items using Shift and then deselect only the second to last item.



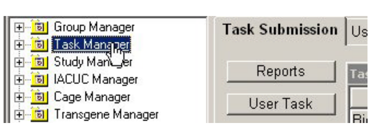
Select a single item by clicking on it when it is deselected (this will deselect all other items).



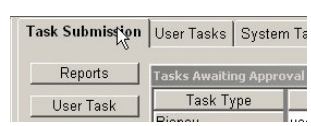
Moving Between Managers



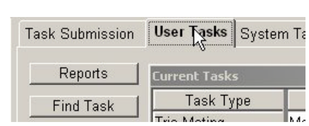
Use the function browser along the left side of the RISE window to navigate between windows. Hold the mouse over the desired manager until it turns blue and underlined, and then click. When you enter a manager, you always start on the first tab-page in that Manager.



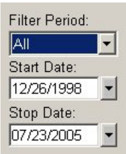
Moving Between Tab-pages



There are two ways to move between the tab-pages associated with each manager. Click on the tabs along the top of each manager displayed in the main workspace to open a tab-page. Alternately,

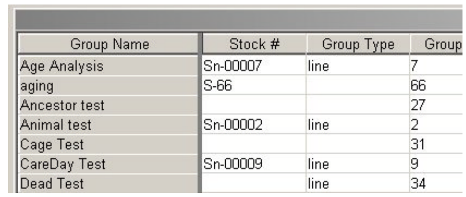


press the "+" sign to the left of a manager in the function browser to bring up a list of tab-pages for that manager.



Filtering by Time Period

Often on a tab-page you will see a filter that allows you to customize the data shown in a window by time period. You can view data from "All" time periods, or you can choose "By Date" and use the provided date fields to set a custom time period. There are also usually some preset time periods, such as "Today," "Tomorrow," or "This Week."



Group Name	Stock #	Group Type	Group
Age Analysis	Sn-00007	line	7
aging	S-66		66
Ancestor test			27
Animal test	Sn-00002	line	2
Cage Test			31
CareDay Test	Sn-00009	line	9
Dead Test		line	34

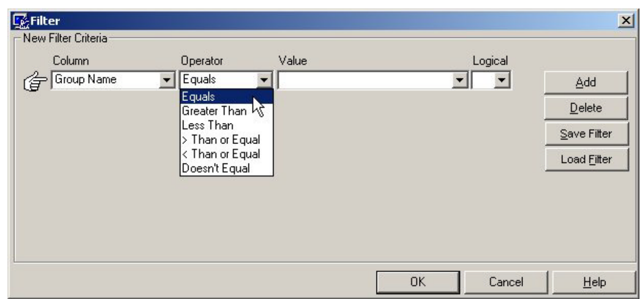
Filter

Filter allows you to selectively show rows of data. Drop-down lists make this function especially easy to use. Criteria can also be entered manually; Filter contains an auto-completion feature that further simplifies the process. For example, if you press the "G" key when you have the Column drop-down list open, the list will automatically move down to "Gene Name" (the first item in the list beginning with G). Press Add to add a new line to the filter criteria and Delete to remove the selected line. You can also save and load filters. Above is a picture of some unfiltered data, that we'll filter using the steps described in the following images.

Column

The first step is to choose a column to filter for. The filter will only act within the chosen data column. If you were filtering a group report, you might choose "Group Name" or "Strain" for your filter.

Tip: Each filter has its own drop-down list.



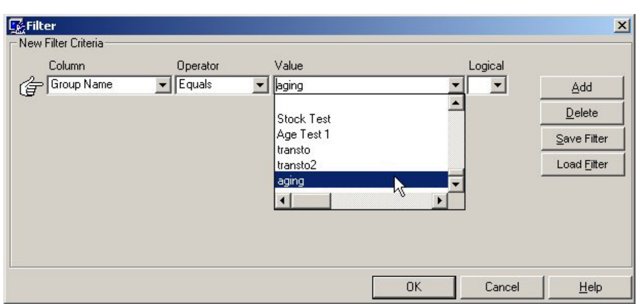
Operator

The operator selects which of the data in the chosen column is diplayed.

Equals - displays all exact matches of Value; case-sensitive

Greater Than and > or Equal - displays items that are further along in the alphanumeric data set.

Less Than and < Than or Equal - displays items that are further back in the alphanumeric data set. For example, a value of "b" and a Less Than operator would filter out all words not beginning with "a," and thus display only "a" words).



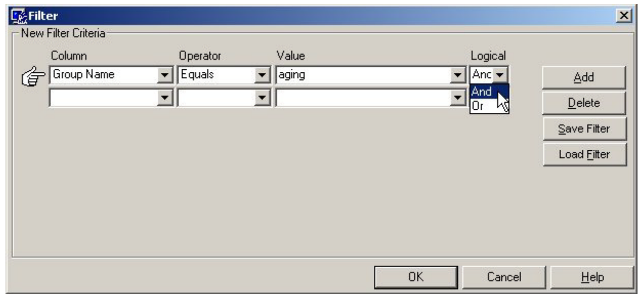
Tip: Greater than and less than are most useful for numbers; using letters provides confusing results. For example, "test 11" appears as less than "test 8" because the first "1" in "11" is less than "8."

Doesn't Equal - hides all exact matches of Value. This is case-sensitive.

Value

The value is the number or text string that the filter compares to each instance in the column. Keep in mind that when looking for a value, uppercase and lowercase letters are considered differently. Therefore looking for all samples of type "A" is different than looking for samples of type "a." Auto-completion will help you find the item you're looking for; simply begin to type the desired text into this field.

Logical

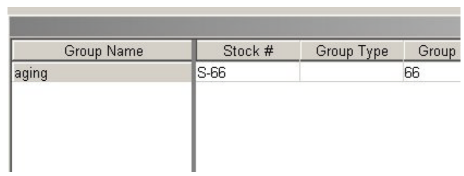


Use the Logical window to add further filtering criteria. If no instances meet all the given criteria, all items will be hidden.

And - Instances must meet all criteria to be displayed. For example, items must have a Group # less than "4" and a Species equal to "mouse."

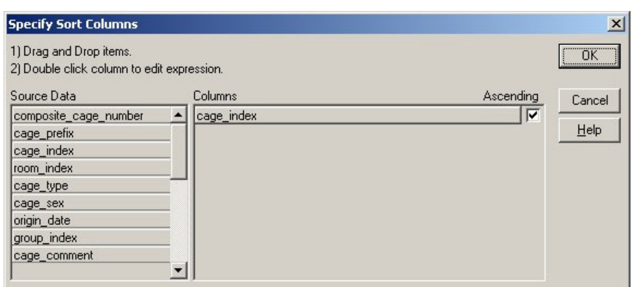
Or - Instances must meet either of the criteria to be displayed. For example, if you set Species equal to "mouse" or Species equal to "rat," all ovines and canines will be displayed.

Here is the result of the filter used on the data above:

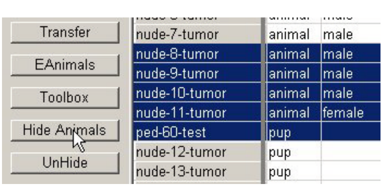


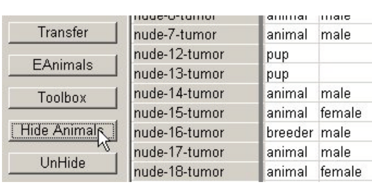
Sort

The Sort function is similar to Filter, except that it reorganizes items instead of hiding them. Press Sort to open a new Specify Sort Columns window. Drag items from the "Source Data" field to the "Columns" field to assign them as sort criteria, or the other direction to unassign them. Items can be assorted in alphabetically ascending or descending order.



It is possible to use more than one criteria for sorting the items by placing additional criteria into the "Columns" field. For example, you can sort first by Species and then by Group #. This means that groups will be sorted alphabetically by species (guinea pig, mouse, rat, for example) and then if there is more than one group of a given species, groups within that species will be sorted by Group #.



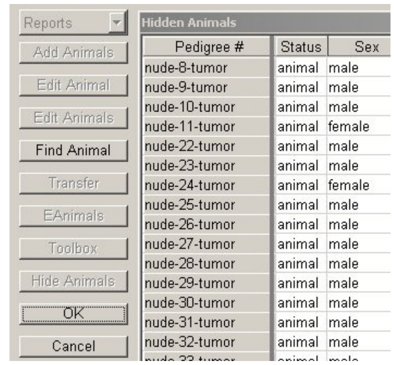


Hide/UnHide (or Delete/UnDelete)

To remove an item from view, click Hide. The item still exists in the database, but it is no longer visible.

UnHide will bring up a window containing all currently hidden items. Select an item and then press OK to return it to visible. If you don't want to unhide the selected animal, go to a different tab-page and come back to unselect the animal, and press OK.

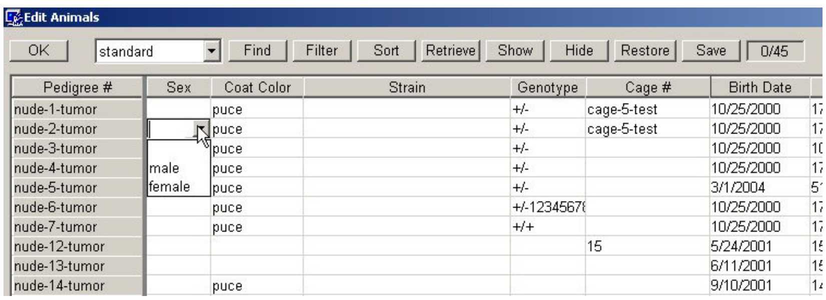
Sometimes there is no UnHide/UnDelete function. If this is the case, the hidden data remains in the database, but it is more difficult to retrieve. If there is no UnHide option, Hide basically acts like Delete, although information is preserved.

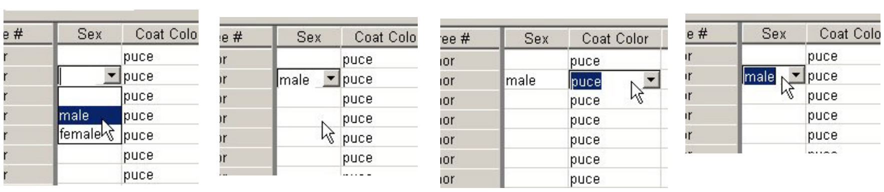


Tip: **For security reasons, some items cannot be deleted. This measure protects you from accidently getting rid of an important group, animal, etc. and also facilitates some functions of FACILITY. Use Hide if you do not currently need to view information for a particular item.**

Edit (Item)

For example, Edit Animal. In most cases, the Edit button on a tab-page will open a window similar or identical to the Add/New/Create button for that tab-page. You can usually double-click on an item to open an Edit window, or select the item to be edited and press the Edit button.

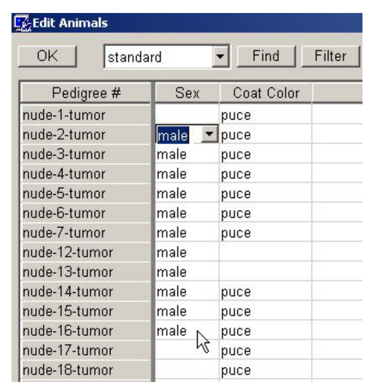




Tip: **Edits are permanent once you press OK.**

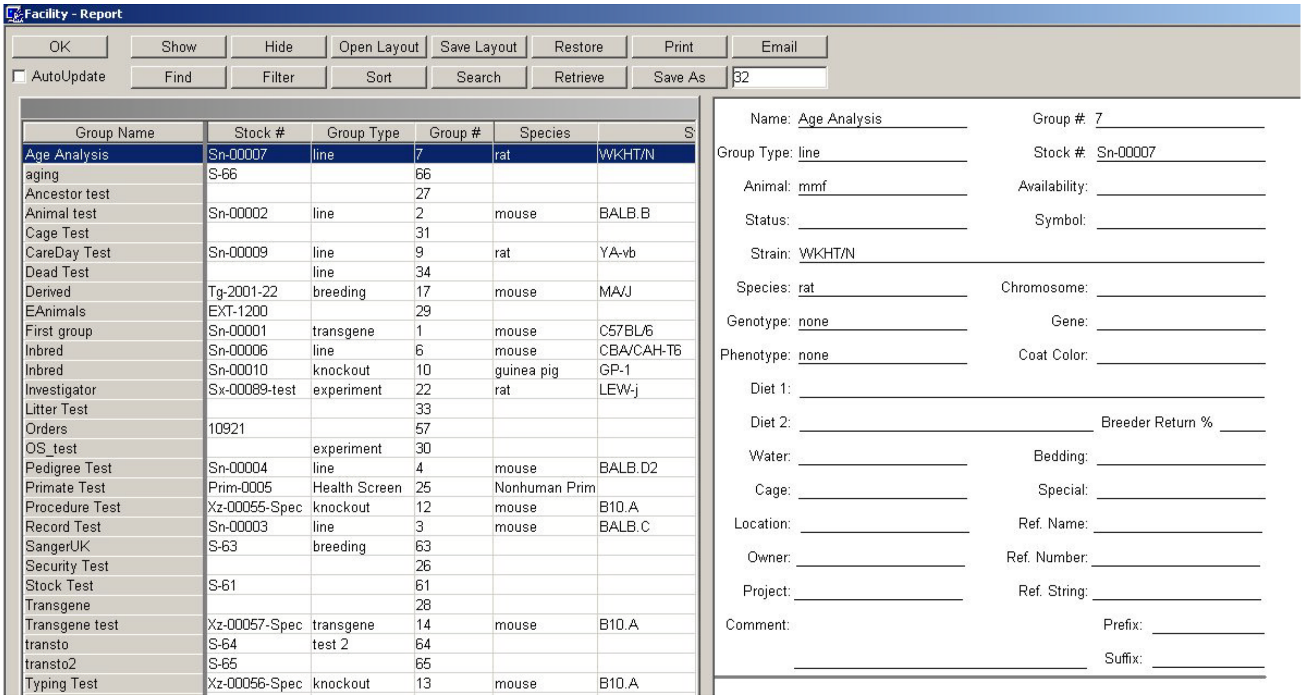
Edit (Items)

For example, Edit Animals. When a button says that you can edit multiple items, press this button to bring you to a report-like form where you can change values directly, either manually or using drop-down lists. The selection type for this form varies; sometimes only selected items will appear on this form, and sometimes all items will appear on hte form. Many of these forms also offer Excel-style editing for quick data entry. To perform Excel-style editing, first choose the column in which you want to make the edits. Select a value from the drop-down list, or enter text manually. Click elsewhere on the form, outside of the field you just edited. (If you try to click and drag the information without clicking elsewhere first, you will only be able to edit the information in that field.) Then, click back in the field you wish to propagate, and while holding the mouse button down, drag vertically either up or down. Let go of the mouse button when you have dragged the information as far as you want it to go. This can be very useful when you have a bunch of animals of the same strain, sex, or coat color, for example. If you don't use this method, you'll have to edit the animals individually, which can be time consuming if you have a lot of animals.



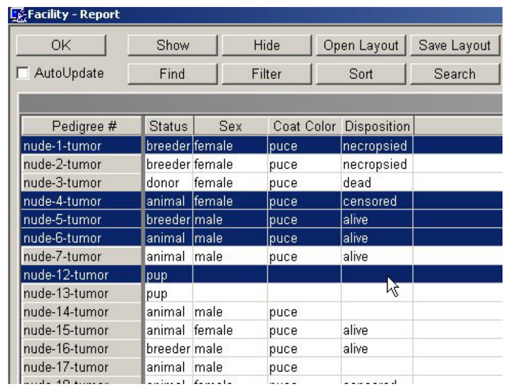
Reports

Reports are an integral part of Facility. There is a Reports function available on every tab-page. This function allows you to view all information pertinent to that tab-page in a new window, and to change how that information is displayed using Show, Hide, Filter, and Sort. From this window you can also Save, Print, or E-mail the layouts you have created.



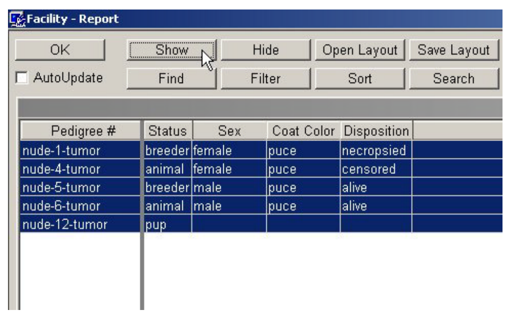
OK

Press to close the window. Changes in report appearance will not be automatically saved.



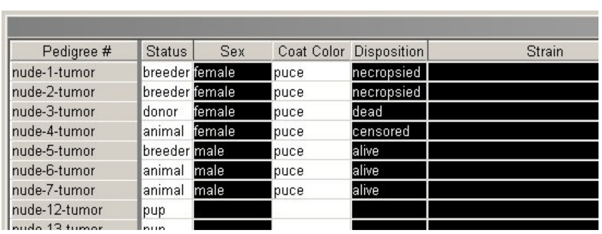
Show

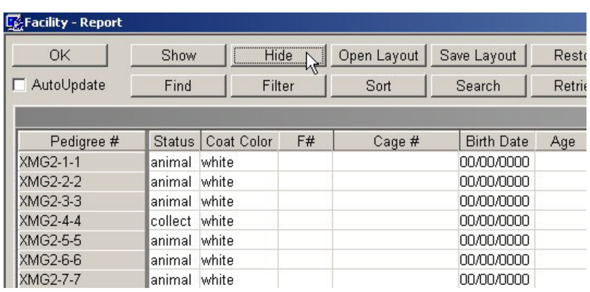
Press Show to display only selected rows. Pressing Show again will hide additional rows. Click Save Layout to save the report as it appears in the window. Print will only print the rows shown. Click on Restore to display all rows.



Hide

The opposite of Show, but for columns instead of rows. Selected column(s) will be hidden. This is a useful feature





for printing - hide columns so you won't print pages of unnecessary data. Click on Restore to display all columns.

Open Layout

You can save alterations you make to the appearance of the report as layouts, and later retrieve them by clicking Open Layout.

Save Layout

Once you have used Filter, Sort, Show and/or hide to alter the appearance of a report, you can use Save Layout to save the changes for later retrieval.

Restore

Use this button to restore any items that have been hidden using the Hide, Show or Search functions. Returns the report form to its original state.

Print, Print Setup

See below.

Email

Email the report as it appears in the report window by selecting a staff or non-staff member's name from the displayed list. You can select multiple names using the methods described above. When you click OK, the report will be sent in spreadsheet format as an attachment using your default email.

Find

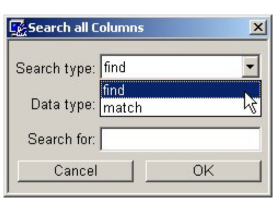
Search for specific instances within the report. Find differs from report to report. Mostly, find searches for animals by pedigree number.

Filter, Sort

See above.

Search

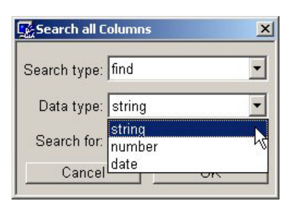
Similar to Find, but more powerful. Find usually requires that you know a specific identifying feature of the data you are looking for. Also similar to Filter, but Search looks through the entire report for the desired value instead of just one column.



Search Type

Find - display any exact matches of the text in Search For; case-sensitive. For example, if you try to Find "test," "test 1" will not appear. Neither will "Test."

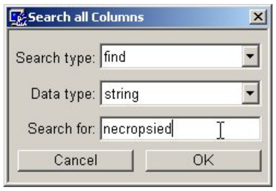
Match - display all occurences of the text in Search For; case-sensitive. For example, if you try to Match "test," "test 1," "mytest," and "atestcase" will all be displayed. However, "Test" will not be displayed.



Data Type

String - search for the specified sequence of characters - letters, numbers, etc. This is the most flexible data type, and encompasses the other two.

Number - only allows numerical searches.



Date - provides a format for looking up a date.

Search For

Enter the value you wish to search for in this window. Remember, searches are case-sensitive. Search criteria are not preserved - the Search window will return to default once the search is completed.

Tip: Press Restore to return the report to default view once your search is over.

Retrieve

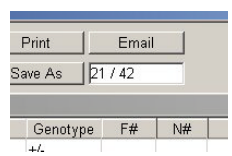
Retrieve returns all rows that have been hidden using Filter or Search; use this instead of Restore if you want to, for example, return filtered animals without also returning hidden columns.

Save As

Save As allows you to save the report in a different format that is more easily exported and viewed outside of Facility. Specifically, you can save the report as a .csv file, which can be viewed using Microsoft Excel. Thus you can view the report outside of Facility on different machines.

The Count Display

The Count Display appears to the right of the Save As button. If no rows are hidden, the count display shows the total number of rows in the report. If rows are hidden, this window displays number of rows shown/total number of rows.

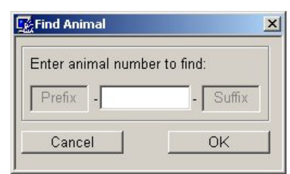


The Auto-Update Checkbox

Check this box to allow Facility to automatically refresh the report every three to five seconds. This allows the data to be displayed dynamically - if there are several users on a network modifying the report at the same time, changes will be immediately available to all.

Find Animal

Use Find Animal to look for animals by pedigree number. This is a good way to quickly find the animal you are looking for, as long as you know its number. Find will select the desired animal on the current tab-page. If you have duplicate animals (animals with the same pedigree number) the first animal in the list will be displayed.



Tip: Find is case-sensitive.

Find Group

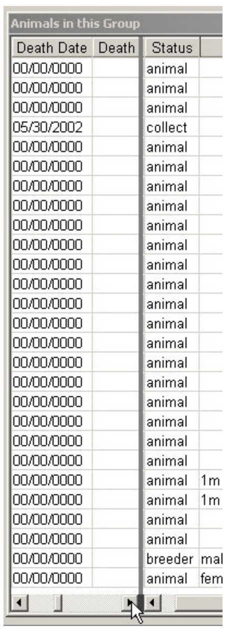
Find Group provides a quick way to find the group you are looking for out of a long list. You can find groups by name, number, Stock #, Animal Prefix, or Animal Suffix. Select the desired criteria and Enter Group to Find. Your group will be highlighted in the groups window.

Tip: Finding groups is case-sensitive. Typing s-2 will not find a group

with a stock number of S-2.

Find Cage

Find Cage provides a quick way to find the cage you are looking for out of a long list. You can find cages by Cage Barcode, Cage Number, Cage Prefix, or Cage Suffix. Select the desired criteria and Enter Cage to Find. Your group will be highlighted in the cages window. If there are multiple items that fit your criteria, the first matching item will be displayed.



Reference Columns and Displaying Overflow Information

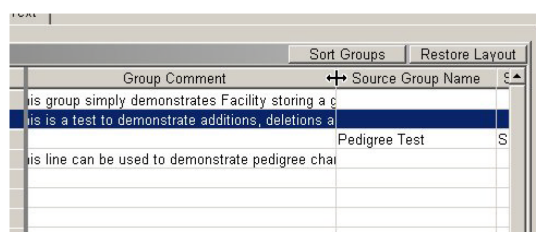
Some windows will not be wide enough to hold all their data. Scrollbars are provided to view additional data.

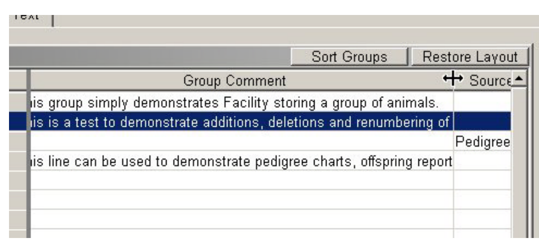
Reference Columns

Note that within a window (on the left side) there may be a place-holder column with a scroll-bar at the bottom. This column can be used as a reference point as you view large amounts of data. By scrolling through this column, you can select the information you prefer to keep as a stationary reference. For example, if you want to keep track of "Death Date" in a report, you could scroll the reference column to "Death Date" and then scroll the main window to view the information for each group. This way, you could easily see which group number was associated with what data. Note that the reference column itself cannot be resized. Reference columns are provided for most data windows.

Overflow Within Columns

If a column is not wide enough to display all the information it contains, you can easily resize the column. Move the mouse up to the column header and place it on the dividing line between two column until the cursor appears as a line with two arrows pointing to either side. Pull in either direction to resize the column.





Print/Print Setup

Print the tab-page or report information as it appears currently in the window. All columns will be printed (not just those currently visible) unless otherwise specified. You will be warned if Print will produce more than one page. Use Print Setup to change print settings before you print.

Exiting Facility

There are three methods to exit Facility. You can close the Facility window by clicking on the "X" in the upper-left corner. Alternately, you can press Exit under File on the menu bar. There is also a symbol of a door directly under the menu bar that you can press to exit Facility. If necessary, you will be prompted to save before exiting Facility.

Notes

Appendix C.

List of Tutorials

Appendix D: Quick-Start Guide

Getting Started - Creating and Managing Groups, Animals, and Holding Cages

1. Open the Group Manager.
2. From the Current Groups tab-page, **create the desired groups** for your animals. All animals must belong to groups.
3. Go to the Animals in Group tab-page to enter information for any animals currently in your system. (If you have a large number of animals, you might want to ask Locus about importing information.)
4. Press Add Animals to **add one or more animals at a time**, all with the same animal information. At this stage you can choose whether or not to create cages in the system to assign animals to.
5. Edit individual animal information by pressing Edit Animal or double-clicking; edit large amounts of information by pressing Edit Animals.
6. To **transfer animals between groups**, select one or more animals then press the Transfer button. Choose the destination group and press OK to complete the move.
7. Go to the Cages tab-page of the Cage Manager to view cages created when you used Add Animals.
8. **Add holding cages** for any animals unassigned during creation.
9. Go to the Assign tab-page to view and assign unhoused animals.
10. To **move animals between holding cages** (cages must be in the same group!) go to the Move tab-page. Select a “from” cage and a “to” cage, then drag animals from the top right window to the bottom right window.
11. You can also assign animals in the Location Manager.

Animal Breeding - Pair/Trio, Transgene, and Harem (Production)

Choose a model for animal mating - regular, transgene, or production. It’s best to limit each group to one breeding model in order to avoid cage confustion.

Regular Mating

1. For regular mating, start on the Cages tab-page of the Cage Manager.
2. Select a group to view, then **create breeding and holding cages** for that group.
3. Go to the Mating tab-page, and **place breeding males and females** (either animals in your system or background animals) into the mating cages.
4. Once **litters have been born**, record them on the Litters tab-page.
5. When the pups are **ready to be weaned**, use the Weaning tab-page to move them to holding cages.

Transgene Mating

1. For transgene mating, first select the desired group on the Current Groups tab-page of the Group Manager.
2. Go to the Animals tab-page of the Transgene Manager.
3. **Assign animals as Donors, Studs, Hosts, or SterileStuds.**
4. On the Cage tab-page, **create donor, host, breeder, and holding cages.**
5. Go to the Mate tab-page, and **place donors and studs into the selected donor cage.**
6. **Place hosts and sterile studs in host cages** on the Sterile tab-page.
7. Once you’ve collected, treated, and implanted embryo cells, **transfer hosts into breeder cages** on the Xfer tab-page.
8. Once **litters have been born**, record them on the Litters tab-page.

9. Use the T-Wean tab-page to **transfer pups to holding cages** when they are ready to be weaned.
10. Use the rest of the tag-page to keep track of the preperation of donors, hosts, and implants.

Production Mating

1. For production mating, start on the Caging tab-page of the Production Manager.
2. Select a group to view, then **create harem, breeder, and holding cages** for that group.
3. Go to the Harem tab-page to **assign males and females to harem cages**.
4. **Transfer females to breeder cages** on the Transfer tab-page once they become pregnant.
5. **Record breeder cage litters** on the Breed tab-page.
6. When it's time to wean, **transfer pups to holding cages** on the Wean tab-page.

Note that pups will remain in the parental group unless transferred.

Managing People and Places - Team and Locations

1. Open the Team Manager.
2. **Create and maintain records** for principal investigators, technicians, and non-staff contacts on the various tab-pages.
3. Open the Location Manager.
4. **Create campuses, buildings, rooms, racks, and slots** for experiments and to house animals.
5. Once you have room and rack locations, you can **assign cages to racks** whenever you create or edit cages.
6. Cages assigned to racks can be put in slots on the Slots tab-page of the Location Manager. This will show you the **exact physical location** of your animals.

Performing Experiments - IACUC Protocols, Studies, and Samples

1. **Create and approve IACUC protocols** in the IACUC Manager.
2. Once you have IACUC protocols, you can **assign groups to protocols** on the Current Groups tab-page of the Group Manager.
3. Use the Study Manager to **create records of experimental studie**s.
4. **Assign animals and text to your studies.**
5. Use the Sample Manager to keep track of data samples associated with your animals.
6. **Collect image, video clip, and other samples.**

Putting Animals to Good Use - Tasks, Procedures, and Advisor

1. Create user, system, and repetitive tasks in the Task Manager to **keep track of task dates**.
2. When you create tasks, you can assign animals to them from current groups.
3. **Procedures can be recorded for every animal in a group**, along with date and user.
4. Use the Procedure Manager to add procedures to a group, and to record procedure information for the animals in that group.
5. The Advisor lets you **maximize your facility efficiency**.
6. Use the Alarms tab-page to **warn yourself of overdue events.**
7. The Groups, Litters, and Ages tab-pages will help you **breed animals more effectively.**
8. **Simplify the process of choosing outbreed mates** on the Outbreed tab-page.

Monitoring Animals - Animal Assessment and Health

1. In Animal Assessment, you can keep track of **customized one-time and periodic animal information**.
2. Use the Charts tab-page to see a **visual representation of periodic data**, from either the Actions tab-page or the Assessments tab-page.
3. The Health Manager will let you **maintain Wellness Reports and data on animal tests.**
4. You can also use the Health Manager to **maintain room health.**

Managerial Matters - Ordering, Shipping, and Accounts

1. **Transfer animals records within your facility** using the Internal Order Manager.
2. **Record receipt of animals from outside vendors** using the External Order Manger.
3. **Record animal shipments to outside customers** using the Shipping Manager.
4. Use the Account Manager to **create new accounts to assign to orders, groups, etc.**
5. **View costs associated to animal maintenance** on the Care Days and Cage Days tab-pages.
6. **View costs associated to tasks** on the Task Charges tab-page.
7. **View costs associated to procedures** on the Procedures tab-page.
8. Use the Internal, Vendor, and Shipments tab-pages to **view ordering and shipping costs**.

Other Information - Reports

1. **Reports** are currently provided on almost every tab-page. Reports provide an easy way to view all the data related to the current tab-page. Reports can be edited, saved, and printed: see Common Procedures for more information on reports.
2. Learn the basics of using Facility in Appendix B: **Common Procedures**.

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